



C4B COM FOR BUSINESS

XPhone Unified Communications ²⁰¹¹

User manual

XPhone UC Commander

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This manual is based on: XPhone Unified Communications 2011, as of November 2012

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1 Help

The operation of XPhone UC Commander is intuitive and has been designed as simply as possible – should you however require help for a specific action, assistance is provided by the online help. Cross references to related subjects and additional information are set up in the form of hyperlinks, enabling you to go straight there at a click of your mouse. Explanations, practical tips, notes, warnings and examples are highlighted by coloured icons.

Searching for a subject in the contents

- a) Go to **?**.
- b) Select **Contents**.
- c) A split window opens. The left-hand view displays the table of contents.
- d) Select the chapter that relates to your search.
- e) The chapter contents appear in the right-hand window.
- f) Use the arrow keys to scroll through the help.

Searching for a subject in the index

You can enter search terms in the index function and then open the corresponding entries.

- a) Go to **?**.
- b) Select **Index**.
- c) A split window opens. The left-hand view displays the index in alphabetical order.
- d) Enter your search term in the field.
- e) Press Return to confirm. The explanation relating to your search term appears in the right-hand window.

Context help

Context help is a context-sensitive function that displays explanations on the individual areas of the XPhone UC Commander window.

- a) Go to **?**.
- b) Select **Context help**.
- c) A question mark appears next to the mouse cursor. Go to the section of the XPhone UC Commander window for which you require information.
- d) Click on this area. A tooltip containing the explanation appears.

2 Introduction

2.1 What is XPhone UC?

XPhone UC provides a range of communications solutions for mid-sized and large businesses in one single product. The XPhone UC solutions can be used individually or in combination. All the products are equipped with the XPhone Server integrated telephony and administration software by default. The following products are currently available:

- XPhone UC Commander for the provision of UC functions on the Windows desktop
- XPhone UC Team Panel for perfect team communication and wherever a good overview of the team is required.
- XPhone UC Web for using CTI functions via a web interface. A special variant permits mobile access via your smartphone with an Internet connection.

Key information

The XPhone UC products offer a large range of functions by default. You can only take full advantage of these functions if they are supported by the PBX and telephone driver used by your company. In some cases, you may not be able to use all the functions described here.

Functions that are not available are normally hidden automatically.

Note: some functions are only available in combination with other XPhone UC products. These functions are indicated by an asterisk (*).

2.2 What is XPhone UC Commander?

XPhone UC Commander is part of the XPhone UC product family, which combines communication solutions designed to meet the requirements of mid-size and large companies.

XPhone UC Commander is a client server CTI application that can control all telephone functions through an intuitive graphical user interface. Powerful interfaces make it possible to access all linked databases directly. The system identifies callers the moment the phone rings, and presents all the caller data on your monitor before you even take the call.

As an option, XPhone UC Commander can manage the dispatch of fax and text messages as well as the receipt of voicemail.

There are numerous additional functions that simplify daily work processes. The system can be used to streamline and improve internal communication processes and communication with customers and partners. The software also has an integrated rule engine that can automate other applications and routine tasks triggered by telephone events or execute them as a custom command. The XPhone UC Commander messaging functions are designed to smoothly integrate the software into daily work processes.

XPhone UC Commander can also be used in combination with other XPhone UC products, e.g. with XPhone Virtual Directory.

2.3 System requirements

XPhone UC Commander offers a large range of functions by default. You can only take full advantage of these functions if they are supported by the PBX and telephony driver used by your company. In some cases, you may not be able to use all the functions described here. Due to the way XPhone UC

Commander is programmed, functions are hidden if they are not supported by your driver or PBX configuration.

System requirements

		Commander	Team Panel	UC Web	UM: Fax, Voicemail, SMS
CPU	Desktop	+	+	+	+
	Workstation				
	Server				
RAM	1	+	+	+	+
	2				
	4				
HDD (GB)	10	+	+		+
	50				
	100				
LAN (MBit)	10	+	+	+	+
	100				
	1000				
Operating System	Windows XP Pro (32bit)	+	+	Internet Explorer >= 7,	+
	Windows Vista Pro (32 / 64bit)			Firefox >= 3,	
	Windows 7 Pro (32 / 64 bit)			Safari >= 3.1	
	Windows 8 Pro (32 / 64 bit)				
	Windows 2003 Server(32 / 64bit)				
	Windows Server 2008 (32 / 64bit)				
	Windows Server 2012 (64bit)				
Other	MS Word	+ (*)			+ (*)
	MS Outlook / Lotus Notes	+ (*)	+ (*)		+ (*)

Annotation

Clients	<p>4) Microsoft Office Word XP / 2003 / 2007 / 2010 and Lotus Notes 6.x / 6.5 / 7.x / 8.x for cover sheet and messaging functions.</p> <p>Outlook / Notes: for CTI integration (optional) and UM integration (other e-mail clients via SMTP).</p>
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PBX

XPhone UC solutions are suitable for use with all PBX systems offering a CTI interface which is compatible with the XPhone UC Server. The functions provided in the clients are also restricted by the range of telephony functions available in this CTI interface. For an overview of compatible PBX systems, see www.c4b.de <http://www.c4b.de>.

2.4 About the manual

Structure

This manual guides you through the functions provided by XPhone UC Commander. Individual procedures are listed step by step, enabling you to follow the instructions immediately. There are also hints on how to get the best out of different functions.

Formatting

Functions, buttons, dialog windows and menus are printed in coloured letters, making them easy to recognize. Icons from the user interface are indicated by <<>> where they appear in the text.

Chapters marked with an * describe the combined use of several XPhone Unified Communications solutions.

3 Installation and start-up

3.1 Installation on a workstation

The products are normally installed centrally by the administrator. For the details of this process, see the XPhone UC manual for administrators.

Local installation at the workstation is also possible. Please note that to install locally, you need administrator rights for the PC in question.

3.2 First start-up by the user

The user logs on to the workstation with a password and starts XPhone UC Commander / XPhone UC Team Panel for the first time. The following options are available, depending on the existing IT environment:

3.2.1 Starting the application without logging on

The XPhone UC Commander / XPhone UC Team Panel interface is pulled up and the application is immediately ready for use. This is the case if the administrator has activated integrated Windows logon on XPhone Server. For this to work, the user must log on to a Windows domain when starting the PC.

3.2.2 Filling in the logon screen

Under certain circumstances – if there is no Windows domain available for user authentication, for example – the administrator sets up the integrated XPhone Server logon method. In this case, a logon screen appears first. The user has to enter different types of information depending on the system configuration:


- Enter name and password: If your user data has already been set up in XPhone Server, you only need to enter your logon name and password. You can get this information from your administrator. The logon process is repeated each time the application is started.
- Create your own user account: If your user data has not yet been entered on the server and if the administrator has activated plug and play logon, you can create your own user account. If the administrator has activated plug and play mode, you will see the additional **New user...** button. Click this button to enter your user account data. You will then face various scenarios that depend on the environment used in your company.
 - ☐ If your administrator has planned for you to log on to XPhone Server via your Windows user logon, you only need to enter your first name and last name.
 - ☐ If the administrator also allows access to XPhone Server from outside a Windows domain (this could require the use of XPhone UC Web, for example), activate this check box and enter the logon name you wish to use and a password of your choice.

Hint: if using XPhone UC Web, you can also use a Windows domain logon if your company uses IIS (Internet Information Server) as its web server (instead of the XPhone web server) and Microsoft Internet Explorer. Ask your administrator for more information.

- ☐ If the administrator only plans to use the integrated XPhone Server logon, you need to generate a user account by entering your first name, last name, the logon name you wish to use and a password of your choice.


3.2.3 Entering the IP address and port

Generally, the administrator specifies an IP address that is automatically preassigned to your workstation. You need this IP address to connect the XPhone UC Commander and the XPhone UC Server.

If no address has been preassigned or if you wish to log on to another CTI server, you have to enter the IP address and port manually. In this case, contact your administrator. To retrieve the entry screen directly, click on the XPhone UC logon icon  in the icon tray at the bottom right of your screen.

3.2.4 Changing passwords

If the administrator specified a password, you should change your password when you first start up the product for security reasons.

- a) To do this, click on the XPhone UC logon icon  in the icon tray at the bottom right of your screen.
- b) Enter your new password and confirm it by entering it again.

Note: if you have forgotten your password, the administrator can reset the settings on XPhone UC Serve to reactivate your original password. Please note that if you are using XPhone UC Commander with the Windows domain logon, there is no need for a separate authentication on the server.

3.2.5 Storage location for configuration and operational data

XPhone UC Commander uses the following directories to store the configuration locally:

- Local application data for all users, e.g.:

`C:\Documents and Settings\All Users\Application data\XPhone40`

- Templates subdirectory: contains all messaging template files (letter, fax, e-mail)
- User's application data directory
- Call journal file: xphone40.CDB
- Personal address book: Personal address book.mdb.
- Control file for rules: (Tools->External applications) xphone.rdb
- Index files for call number ID (.idx file extension)
- Program directory, e.g.:

`C:\Program Files\XPhone40`

- XPhone UC Commander programme files

- Common files, e.g.:

`C:\Program Files\Common files\C4B`

- Program components required by several products.

3.2.6 Upgrade from an earlier version to XPhone UC Commander

If an older version is already installed on the workstation, you should only uninstall it before installing XPhone UC Commander if you do not want to import the earlier configuration for XPhone UC Commander.

To upgrade the product, all you need to do is execute the XPhone UC Commander setup program on the workstation. You need administrator rights to do this. You do not however need to enter any license numbers at the client as licensing is controlled by XPhone UC Server.

If the administrator has not set up any server-based configuration, the configuration data from a version already installed is imported the first time the program is started. The older version can then be uninstalled.

Rollback:

If you wish to continue to use the previous version, uninstall both XPhone UC Commander and the previous version. Install the previous version again. If you manage fax and voicemail messages in your client, you will then have to change the name of the fax directory. Please note that all other programs such as XPhone CTI Team V3 or XPhone UC Team Panel need to be uninstalled first before the previous

version is re-installed.

Rename directory `C:\Users\<User>\AppData\Local\XPhone40` as `C:\Users\<User>\AppData\Local\XPhone30`.

3.2.7 Restricted functions using workstation templates

XPhone UC 2011 makes it possible for the administrator to allow or block certain functions for users in the applications. This means that fewer functions may be available for the user than actually installed or used in a previous version of XPhone UC.

4 Programme interface

4.1 Views

Fullscreen



The user can select either fullscreen or compact view. The fullscreen is divided into

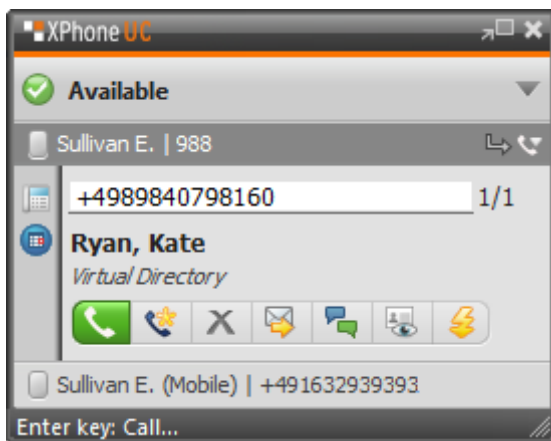
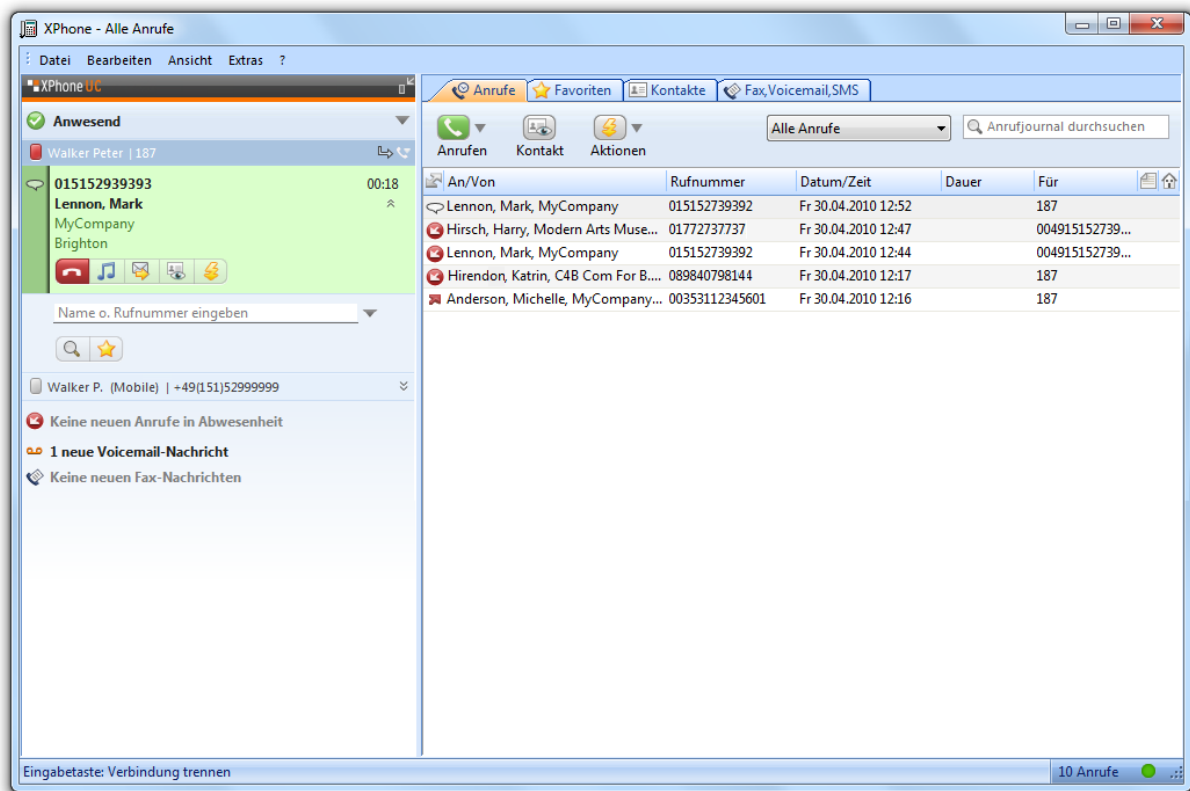
- Call manager (top left)
- Info manager (lower right)
- View for call journal, favourites, contacts, fax / voicemail / text message

Depending on the license, more or fewer views can be available.

Compact view

XPhone UC can also be used in a reduced view, i.e. compact view. Depending on the line status, all telephone functions and additional functions are available in context. The advantage of this view: the window is small and does not distract from the running application, but all telephony functions are immediately available. You can also find contacts in this view, and a compact journal lists the most recent 20 calls.

The views are changed using the designated buttons  and . Alternatively, the view can also be changed using hotkeys (default F11 and shift F11).



4.2 Tabs

Several tabs are visible in the right-hand section of the window in the full view:

- Calls
- Favourites
- Contacts
- Fax, voicemail, text message

Tip:

If you click New messages in the Info Manager, the relevant tab for the corresponding context opens.

Example: You have received new voicemails and click "2 new voicemails" in the Info Manager and

the **Fax, voicemail, text message** tab opens automatically.

4.2.1 Calls

The call journal is shown in the **Calls** tab.

All calls taking place in the past 90 days are shown in the default view. You can execute actions for individual entries by marking either the contact followed by using the Call, Contact, Actions buttons or by calling the requisite action directly via the context menu (right-click).

The calls which are currently visible are shown in the top right-hand area. This is **All calls** by default. The journal display can be filtered accordingly using this drop down list so that only Pending calls, Completed calls, Missed calls or the Recycle bin are shown, for example.

Use the search field on the right to browse the call journal. The search is performed even as you type with the result that you may not even need to enter the full name or phone number.

Use **Tools->Options** to change the configurations for the call journal if necessary to enable calls to be deleted after 30 days, for example.

4.2.2 Favourites

The Favourites view contains contacts with whom communication is frequent. The view comprises:

- Contacts in one of your teams: Teams are formed by the administrator and cannot be edited by the user.
- Myfavourites: contacts you have added to the Favourites view from one of your address books. Please note that you can only add contacts entered in an address book. The contact data is imported to the view when the contact is added. The display data is re-synchronized with the address books when you execute the **Data synchronization** function which can be found under the **Favourites** button.
- Recent contacts: this display group is automatically filled with the last 50 contacts whose phone numbers can be assigned to a contact and who are not in one of your teams or My favourites.

Contacts can be added to My favourites from various other views:

- Journal if the caller has been identified.
- Contact view
- Call manager if contact data is available.

Contacts are added via the **Add to favourites** menu item in the contact's Context or Action menu.

Tip: Drag & drop the contacts into the desired group in the Favourites view. Please note that contacts cannot be added to teams.

4.2.3 Contacts

The Contacts tab enables you to search for contacts in all or certain linked address books and shows them accordingly. Search criteria can be defined on the basis of which the address books are searched.

You can specify the columns to be shown and in which order. Change the default display by right-clicking a column header followed by selecting the corresponding action.

See Data base connection "Connecting databases" starting from page 37 for a description of how to create or link new address books.

4.2.4 Fax, Voicemail, Text message

Incoming voicemails and faxes as well as outgoing text messages and faxes are managed in the Fax, voicemail, text message tab. You can also create and send new faxes and text messages here. Thanks to the icons, it is obvious at a glance what type of UM message is involved. Only certain messages can also be shown via the "All messages, inbox, outbox, archive" filter.

A detailed description of the UM functions is available under Unified Messaging functions "Fax, Voicemail, Text message".

Note: Under certain circumstances, your administrator may lock some functions with the result that you may not avail of all of the functions described.

4.3 Operation

You can operate the compact view (call manager) using

■ keyboard commands:

- ☐ Use the arrow keys to move to functions on the right or left. Use the up and down arrow keys to switch between areas within the window. Press the return key to activate a function.
- ☐ ESC always jumps back to the call manager entry field.
- ☐ Clicking F2–F5 switches the views.
- ☐ If a view is activated via the TAB, the display list is active. Use the scroll wheel for scrolling. Typing characters triggers a focus on the entry field. Press ESC to exit the entry field. The focus returns to the list. Pressing ESC again triggers the same action as in 2.
- ☐ You can navigate with TAB inside the views.

■ Mouse click: All functions can also be triggered by mouse click.

When the application is started, the call manager entry field is always active.

Tip: The selected function is displayed and explained at the bottom of the window. Tool tips also explain the selected function.

Changing views / Calling applications

You can set a default view.

- a) Open the **Tools** menu item and select **Options**.
- b) Go to **General** and use the **Preferred view** drop down menu to select the default view.

Telephony functions, advanced functions

For the telephony and advanced function icons and their meaning, see the XPhone UC short guide.

5 Making calls with XPhone UC Commander

5.1 Dialling

5.1.1 Manual phone number entry

You can use the keyboard to enter phone numbers in the entry field of the call manager (compact view). Press the return button or click the green receiver to dial the number.

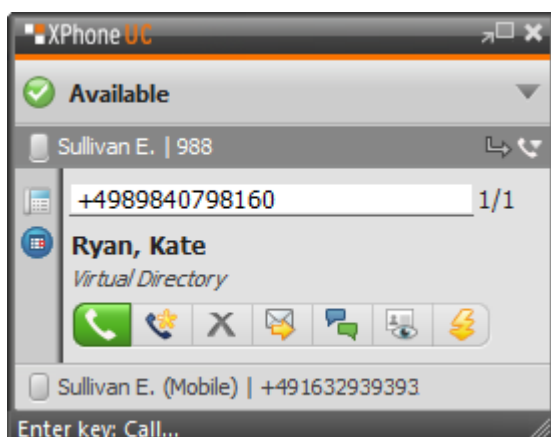
5.1.2 Contact search

It is far more convenient to search for the phone number in the connected databases and then dial automatically.

- a) Enter the name or part of the name of the recipient into the entry field of the call manager (compact view). You do not need to move the cursor to the entry field. If you are viewing the telephony window, you can begin entering the number.
- b) Press the enter button or click <<Search>> to start the search. The action dialog opens.
- c) The search results are displayed directly in the window. If a contact has more than one phone number, you can use the arrow keys on your keyboard to scroll through the numbers.
- d) If the search results contain more than one contact for your search term, you can
 - ☐ use the arrow keys to scroll to the required search result or
 - ☐ click on the number next to the XPhone UC Commander entry field; this number is a link and shows the total number of contacts found. The link takes you to the search window listing all the search results.
- e) Select the required number from the search results and begin dialling by clicking the number or <<Dial>>.
- f) Click <<Delete>> to remove the search term from the entry field. You can also use the arrow keys on your keyboard to activate this button.

For information on finding a contact in fullscreen view, see Searching for address book entries.

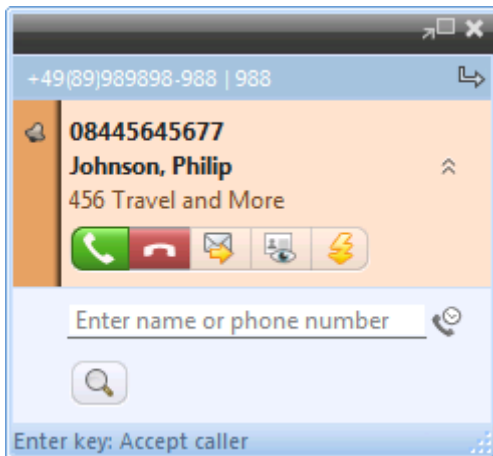
Hint: If you do not want to start the call immediately, you should activate **Prepare** before closing the window. The phone number is transferred to the entry field and you can dial at any point in time. You can also prepare several calls.



5.2 Accepting calls

If you have activated the **Caller popup** function (see Caller ID), the compact view opens automatically when a call comes in. You can use <<Accept call>> to take the call. This is useful, for example, if you are using a headset.

Hint: The caller popup is the recommended default view for inbound and outbound calls, as this view makes all telephone functions available in context before and during a call.



5.3 Terminating / disconnecting calls

To end a call, click <<Disconnect>> in the compact view or use the arrow keys to go to <<Disconnect>> and press enter.

5.4 Transferring / redirecting calls

You can redirect or transfer a call to someone else at any time during a call.

- Enter the phone number, name, or part of name of the required party into the grey entry field and start the search function (see Contact search).
- Select the phone number to transfer it to the entry field. Of course you can also select external phone numbers.
- The call only begins once you click <<Redirect call>> or press enter.
- The first caller is put on hold while you are dialling or connecting.
- You can also redirect your party without speaking to the agent you are redirecting to.

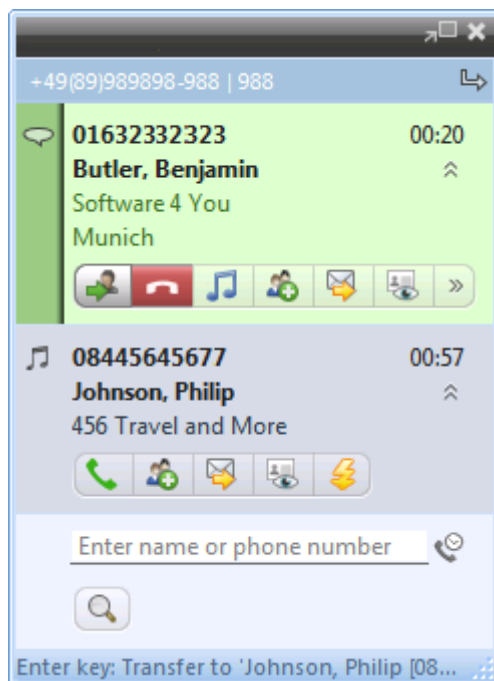
5.5 Display parties on hold

XPhone UC users can be combined into workgroups on XPhone UC Server. These workgroups can be assigned additional functions to support internal communication processes. If there is a consultation call within a workgroup or if a call needs to be redirected, the called party sees the waiting party in the display at the same time as her coworker before she accepts the call. This saves time, streamlines agent preparation and provides greater transparency.

5.6 Consultation and swap hold

You can use the same function to begin a consultation or perform a swap hold.

- Enter the phone number, name, or part of name of the required party into the grey entry field and start the search function (see Contact search).
- Select the phone number to transfer it to the entry field.
- The call only begins once you click <<Dial>> or press enter.
- The first caller is put on hold while you are in consultation.
- As soon as the new party has accepted the call, you can alternate between the calls.



5.7 Conference calls

5.7.1 Expanding a call to a conference

XPhone UC Commander enables you to initiate and process conference calls easily. You can expand a call to a conference call at any time.

- Use the search function to select an additional caller during a call (see Contact search) or enter a phone number in the grey entry field.
- Dial the new party's number. The first party is put on hold.
- As soon as you are connected to the new party, you can start the conference by clicking <<Initiate conference>>.

5.7.2 Preparing conferences

Conferences can be planned in advance, i.e. the individual participants are prepared and can be dialled one by one in any order.

Selecting individual participants

- Find the desired participant (see section on Contact search).
- Activate the **Prepare** function to enter the number in the entry field. The call is not started.

- c) Now click on <<Prepare call>>. A second entry field opens via which you can search for the next participant.
- d) Start participant selection in any order.

Entering several participants from the journal or address book list

- a) Go to the XPhone UC Commander full view (see section on Operation) and open the respective journal, contact or favourites view.
- b) Select the respective participants by holding the CTRL key and clicking from a journal or address book view.
- c) Use the drag & drop function to enter your selection in the area under the entry field.
- d) Start participant selection in any order.

5.7.3 Conference calls from favourite lists

If you have recurring conferences with the same participants, you can save these in your favourites list. You can then call them at any time without having to find and select the participants again.

- a) Go to the <<Favourites>> view. Drag individual contacts or an entire group into the call manager.
- b) Start participant selection in any order.

5.7.4 Ending conference calls

Removing individual participants from a conference call

You can disconnect individual participants by clicking <<Remove conference participant>>. This way, you always have an overview of the participants still taking part in the conference call.

Ending the complete conference call

Clicking on <<End conference>> ends the conference call.

5.8 Call forwarding and Do not disturb

You can also forward calls to other participants, for example if you are away. You can restrict call forwarding to internal and/or external callers. If you do not want to be disturbed for a period of time during the working day, you can use the 'Do not disturb' function. Callers hear a busy tone while your line is still free.

- a) Click on <<Call forwarding/Do not disturb>>.
- b) Specify the calls you wish to be forwarded or activate **Do not disturb**.
- c) Specify the number to which you wish to forward calls. The drop down list shows the most recent forwarding destinations.

Hint: You can also forward calls to other external numbers, e.g. your home office. This will not result in any extra charge to the caller.

5.9 Leaving a message*

You can change your presence status in XPhone UC Commander and leave messages.

The advantage: you can check a coworker's location and availability at any time without contacting them directly. Callers can get reliable updates about the availability of agents who are out of the office.


This is how to enter a company message:

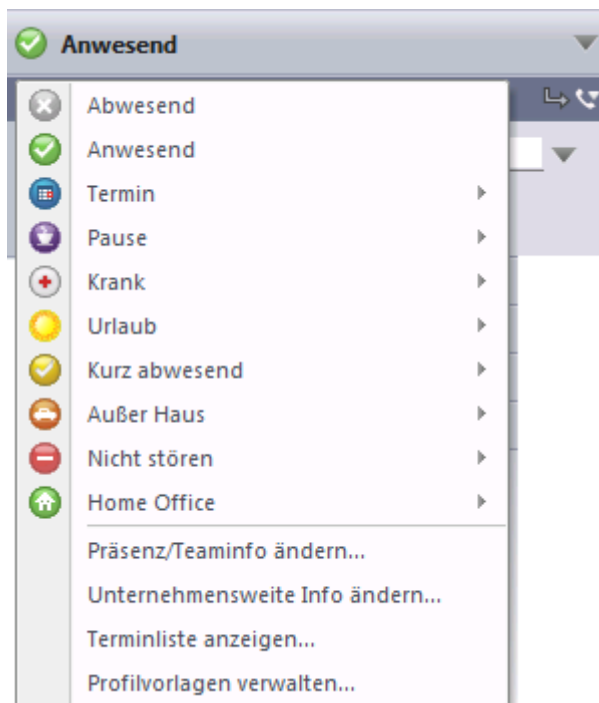
- Click the header above the call manager and select <<Company-wide info>>. This information can be seen by all of your colleagues in the company and remains valid even after the date has expired.

How to change your presence status

- Select a presence profile. The presence profile changes your status and switches to call forwarding if necessary.

Your colleagues will then see the message in the CTI client when a call is forwarded or picked up or when the person is called. To show a message, you may need to activate the detailed view for the call.

Do this by clicking the  symbol in the call display.



5.10 Personal calls

If personal calls are usually made with a different prefix code at your office, you can make separate settings for that code. The administrator must have configured the corresponding prefix code in the PBX.

- Open **Extras -> Telephone**.
- Enter your prefix code for personal calls in the Dialling parameters. These calls are now marked as personal calls in the journal and are then no longer logged anywhere else, e.g. in the Microsoft Outlook journal (see Journaling in Microsoft Outlook).
- Activate personal calls by clicking <<Personal call>>.

5.11 Boss/secretary features

The boss-secretary working relationship walks a fine line between confidentiality and transparency in order to deliver optimal results without hassle. This can be done easily with the special boss/secretary features provided by XPhone UC Commander. To set up a boss/secretary configuration, the employees have to be created in boss/secretary workgroup on XPhone Server (see the XPhone Unified Communications manual for administrators).

Note: A boss/secretary workgroup configured on XPhone Server can include more than one boss or secretary as required. It is also possible to belong to more than one workgroup at the same time.

5.11.1 Boss/secretary functions for the boss's office

See secretary's calling status

Bosses can see not only their own line but also a compact view of the secretary's line, including the current calling status (free, busy, internal/external call) and any active call forwarding. Bosses cannot see who the secretaries are currently talking to.

See forwarded calls

If the boss line is forwarded to the secretary, the boss workstation displays all incoming calls and identifies the callers. The boss can pick up calls that have not been accepted by the secretary. Once the calls are taken by the secretary, they cannot be picked up. However, the caller is still identified at the boss workstation. Answered calls are recorded in the boss workstation journal and flagged accordingly.

Connection: see parties on hold before accepting call

(see Display parties on hold)

Configure call forwarding for secretary

If secretarial tasks are to be performed by a third person (illness, holiday, etc.), the boss workstation can be used to set up call forwarding for the secretary and store a message*, if necessary. To do this, follow the instructions in Call forwarding and Do not disturb.

Note: the boss/secretary function can also be combined with the multiline function for boss workstations with more than one telephone. In this case, it is also possible to carry out confidential calls without the secretary seeing that the boss is on the telephone.

5.11.2 Boss/secretary functions for the secretary

See boss's calling status

The boss's line is also displayed in the CTI client at the secretary's workstation. In addition to the calling status, the client also shows whether calls are being forwarded to the secretary or to another extension.

Detect forwarded calls

If an inbound call is intended for the boss's line, the system will not only display the caller data displayed, but also information about the original called party (see Caller ID via popup).

Discretion: calling party not visible for calls to the boss

The secretary cannot see who the boss is talking to during call signalling or ongoing calls. If the boss makes a consultation call to the secretary during a call, the secretary does not see the party on hold. This ensures maximum confidentiality.

Configure call forwarding for the boss's line

Call forwarding can be set for the boss's phone from the secretary workstation along with a message*. To do this, follow the instructions in Call forwarding and Do not disturb.

Note: if call forwarding has been set, all calls made to boss/secretary workgroup members are

displayed in the call journal to seamlessly track every call made during the member's absence.

5.11.3 Boss/secretary workgroups with more than two employees

A boss/secretary workgroup can have any number of bosses and/or secretaries.

Secretary–secretary authorizations

Secretary employees see coworkers' calling statuses and can configure call forwarding and leave messages* for one another. Waiting parties are displayed before calls are transferred in consultation calls and regular transfers.

Boss–boss authorizations

Bosses see the calling statuses of all their peers. However, they can only set call forwarding and leave messages* for their own line. Waiting parties are not displayed in consultation calls and transfers.

Hint: additional XPhone UC Commander functions improve communications between the boss's office and the secretary. For example, if a secretary picks up a call for the boss's office, he or she can pull up the boss's calendar and enter an appointment or write an e-mail call alert (see Integration in Microsoft Outlook and CTI integration in Lotus Notes).

5.12 Multiline applications

XPhone UC can control up to five telephones simultaneously from one workstation. All the CTI features are available in the Commander graphical user interface for every telephone. Calls on all lines are recorded in the journals and users can see at any time which call is being made on which line. Together with a Mobile Control license, certain mobile devices can also be operated using the multiline function.

Individual lines can be assigned a particular confidentiality status if required so that these lines are not visible to any other users in the workgroup, such as another team member or a secretary. These settings must be made on the XPhone UC Server.

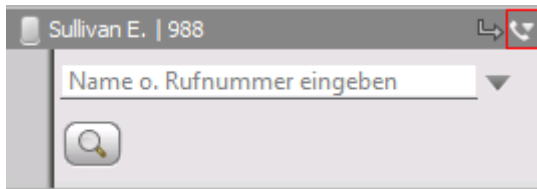
When using the boss/secretary function, additional lines are shown in the call manager for which only restricted control and journal functions are available for security reasons.

Tip: The entry field for the contact search is only visible for one line. Clicking the name of the line switches the entry field.

NB: The top line shown in the call manager is of special significance. All control functions (e.g. dialling) for which no line info is possible are performed on this line. For example: Hotkey dialling, Dialling from external applications (Outlook/Notes), Clicking on hyperlinks (e.g. in journal and contact view). The top line is referred to as the **primary line**. It can be selected via the **Telephony settings** function.

5.13 Settings for telephony

Special settings can be specified for telephony via the call manager. The top line displays a combined receiver/arrow symbol:



Use this symbol to go to the following settings:

Primary line selection

The primary line is the line for which all control functions are executed when the line cannot be indicated, e.g. hotkey dialling, dialling from external applications (Outlook/Notes), clicking on hyperlinks in the journal / in contacts etc.

The primary line is always shown as the top line. Select the device for the primary line with which you prefer to work in a certain situation (e.g. in the office / home office / on the road).

Certain functions such as the forwarding function dependent on presence status, for example, do not work on the primary line but rather on a user's so-called main line. The main line is marked by an asterisk in the selection list. The user cannot change this line – only the administrator can do this. The primary line is normally the first line assigned to a user in the server configuration.

Set up call via company

The primary line can be used to set up calls to any phone if allowed by the PBX (transit communication). The person called is shown the phone number of the main line (usually the main line is on your office phone, i.e. its number is displayed).

Do this by entering any phone number. The main line dials your number first. As soon as you answer, the connection is set up with the desired party. If you call from one external connection to another, two trunk lines are occupied for the duration of the call.

Incoming calls to your main line are displayed in the call manager and can be picked up by clicking the connection currently in use.

Settings for mobile phones

If you use the XPhone Mobile Control product, additional settings are shown here.

- Caller pop-up on mobile phone – For calls to mobile : A pop-up is to be displayed for incoming calls on your mobile phone (caller ID via XPhone Virtual Directory).
- Caller pop-up on mobile phone – For internal calls to office phone: Internal calls to your office phone (main line) are shown in parallel on your mobile phone (twinning function). Caller ID is via XPhone Virtual Directory. If your PBX is enabled correspondingly, the call can be transferred from your office phone to your mobile phone.
- Caller pop-up on mobile phone – For external calls to office phone: Similar to above but only for external calls to your office phone.
- Show mobile phone journal in XPhone UC: The mobile phone journal is automatically scanned and displayed in the XPhone UC applications journal.

6 Presence management

XPhone UC shows you immediately when and whether other team members are available. Each possible presence status has profile templates which show you which colleagues are unavailable, have a meeting (and how long it lasts), are on holiday or have just left their workstation for a few minutes.

XPhone UC specifies various profile templates by default which you can edit or extend to include additional profiles. You can also set up rules to automatically activate your profile templates when certain conditions are met. Learn more on how to [Configure presence profiles](#).

If you enter your meetings in Microsoft Outlook or Lotus Notes, you can synchronize XPhone UC with your calendar. Your meetings are then automatically imported to XPhone UC. This can be done in all cases or only in special cases. Learn more on how to [Synchronize Microsoft Outlook/Lotus Notes calendar](#).

6.1 Information on configuration with presence management templates

Please note that your administrator may have restricted the configuration settings described below.

The administrator can configure the calendar synchronization and the profile templates that are available to the user, which means that users can automatically get settings from XPhone Server. It is also possible to disable individual user settings.


6.2 Using profile templates

XPhone UC Team Panel comes with nine default profile templates for indicating your current presence status:


 <<Available>>

 <<Unavailable>>

 <<Meeting>>


 <<Be right back>>

 <<Break>>

 <<Off Sick>>

 <<On Holiday>>

 <<Out of Office>>

 <<Do Not Disturb>>

 <<Home Office>>

Each of these profiles can be supplemented by additional time information, e.g. 30 minutes or 2 hours. XPhone UC Commander automatically returns to its original state when this period ends.

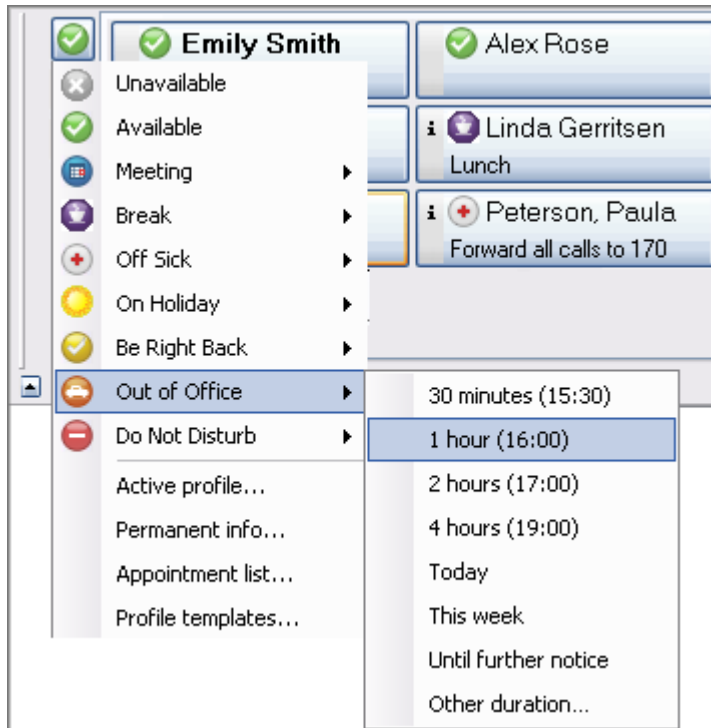
All the members of your team(s) can see your presence status and the selected time period.

Note: Your administrator can restrict the available profile templates and time periods in the central

settings.

Select profile

- Click <<Select profile template>> on the left or uppermost edge of the team panel or click the presence section in the XPhone UC Commander to display a selection list with all available templates.
- Select a profile and specify a time period. XPhone UC Commander automatically returns to its original state when this period ends.
- All the members of your team(s) can see your presence status and the selected time period.



Presence / Team info

You can also add call forwarding and/or team messages to the profile templates. This is useful if you are forwarding all your calls to another team member, but still want certain, special calls put through to you anyway.

- a) Click <<Select profile template>> and select **Edit presence / team info**. Your current profile is activated by default. You can also select a different presence status.

Active profile - Michael O'Connell

Period of validity ☒ 22/10/2009 13:00

Presence Break

Forwarding Forward all external calls to 139

☒ Team info active

Lunch Break, back at 1pm

OK Cancel

- b) If necessary, enter the period of validity.
- c) You can also set up call forwarding and save a team info as well. Your team members will see this message in the XPhone UC Team Panel interface for the entire validity period of your current presence profile. Press **OK** to confirm. These changes are not saved permanently in the profile template – they only apply for the current presence status.

Note: If you select Do not change forwarding in Call forwarding, your calls will continue to be forwarded after your profile has changed back. Select one of the other call forwarding options if you only want your calls to be forwarded while the current presence profile is active.

Edit company-wide info

You can set up messages for other team members that are not controlled by profile templates.

- a) Open the template dialogue by clicking <<Select profile templates>> and select **Edit company-wide info**.
- b) Activate the checkbox, enter your text and select **OK** to confirm.

Unternehmensweite Info - Myers Paula

☒ Unternehmensweite Info anzeigen

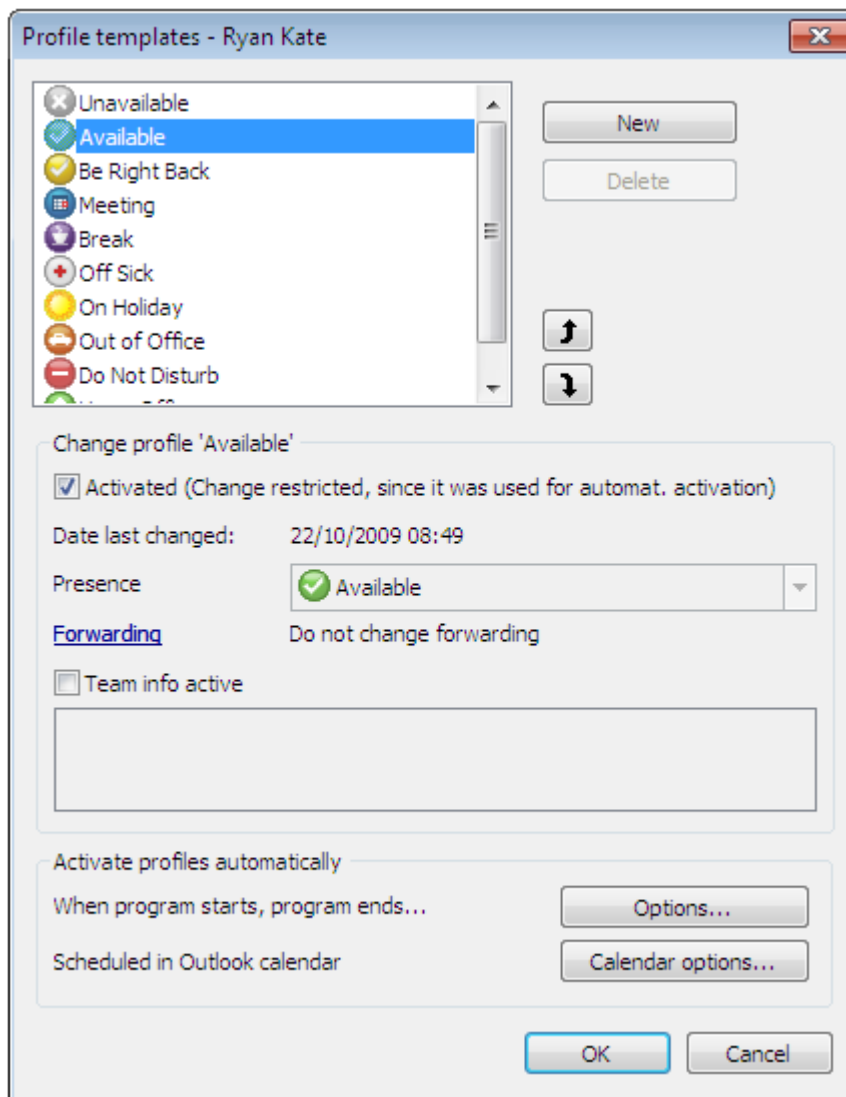
Täglich von 12:00 - 13:00 in der Mittagspause |

OK Abbrechen

6.3 Configuring profile templates

Profile templates can be customized by automatically associating them with call forwarding and/or team infos, for instance. New profile templates can be created just as easily.

Note: You can change the behaviour of your presence templates either permanently in this dialogue, or only temporarily in Edit active profile.



Resorting profile templates

- Click <<Select profile template>> and select **Profile templates**.
- Use the arrow keys to change the order in which the profile templates are displayed.
- Remember to confirm your changes by clicking **OK** before exiting the dialogue.

Creating new profile templates

You can create an unlimited number of new profile templates.

- First select a default template on which to base the new template, and then click New. This will not delete the default template.
- Give your new profile template a name and define it more precisely as described below.

Automatically controlling call forwarding / team infos with profile templates

XPhone UC Commander helps you improve your availability in many different ways: profile templates can be linked with call forwarding and team infos.

Profile templates can be automatically activated depending on certain user behaviour.

Profile templates are controlled via the appointments in your Microsoft Outlook or Lotus Notes calendar.

Option 1: Linking profile templates to call forwarding and/or team infos

You may want to link certain profile templates to call forwarding and/or a message.

Example:

If you don't want to be disturbed, you can have a colleague take all your calls. You simply associate the <<Do Not Disturb>> profile with call forwarding to your colleague's phone.

- Open the template dialogue by clicking <<Select profile template>> and select **Profile templates**.
- Now select the **Do Not Disturb** profile in the Profile Templates dialogue.
- Click **Call forwarding** and configure the call forwarding.
- You can also save a message to be shown to colleagues when you don't want to be disturbed.
- Confirm by clicking **OK**.

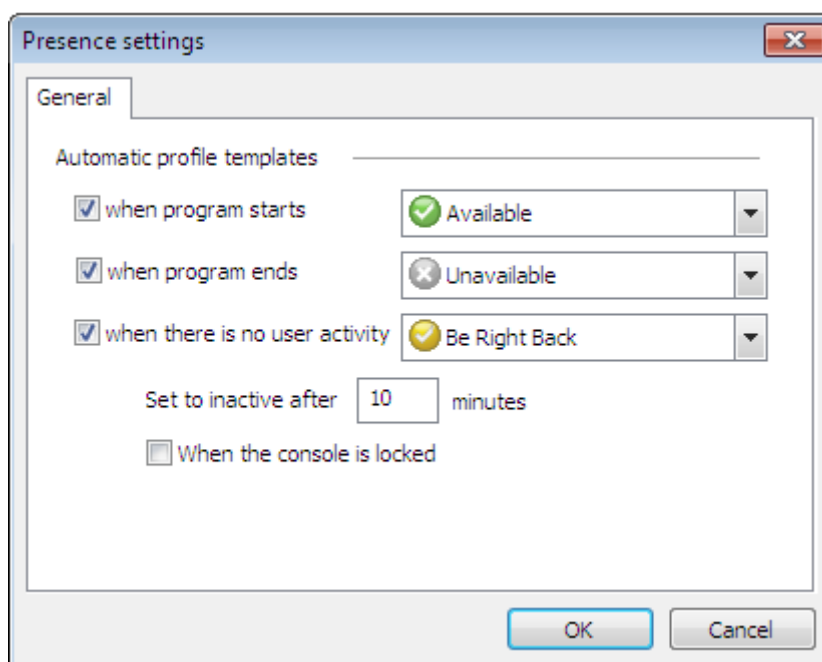
Option 2: Activating profile templates automatically

You can simplify things by configuring your profile templates (with call forwarding and/or team infos) to activate automatically whenever certain conditions are met.

Example:

You want call forwarding to your voicemail box whenever you shut down your PC and leave the office. Then, when you come to the office in the morning and boot up your PC, you want call forwarding to turn off again automatically. You want the call forwarding to voicemail to be in place even when you're away from the office for a longer period of time.

- Open the template dialogue by clicking <<Select profile template>> and select **Profile templates**.
- Go to **Activate profiles automatically**, and click **Options** in When program starts, when program ends....
- Activate the **When program starts**, **When program ends** and **When there is no user activity** checkboxes and specify when to set your status to inactive.



Note: XPhone UC Team Panel judges user activity based on computer use. If you do not use your keyboard or mouse for a certain period of time with the computer on, the software will assume that you have left your desk for a moment or are in a discussion.

Option 3: Activating profile templates scheduled in calendar sync:

Profile templates can also be automatically activated by appointments in your groupware calendar. see "Importing Microsoft Outlook / Lotus Notes appointments" This can be activated via the Outlook/Notes calendar or via the calendar sync between XPhone UC Server and Microsoft Exchange Server without requiring a client to run.

6.4 Importing Microsoft Outlook / Lotus Notes appointments

The administrator can choose between two methods of calendar synchronization.

- Local calendar sync using Outlook and Notes Client
- Central calendar sync between XPhone UC Server and Microsoft Exchange Server

This setting cannot be configured on the client.

Note for Lotus Notes: The current version of XPhone UC Commander does not automatically synchronize with the Notes calendar. Instead, you have to manually activate the synchronization button in the appointment list (can be accessed in the presence template selection menu) whenever you set or change a appointment. A future version of XPhone UC Commander will support automatic synchronization.

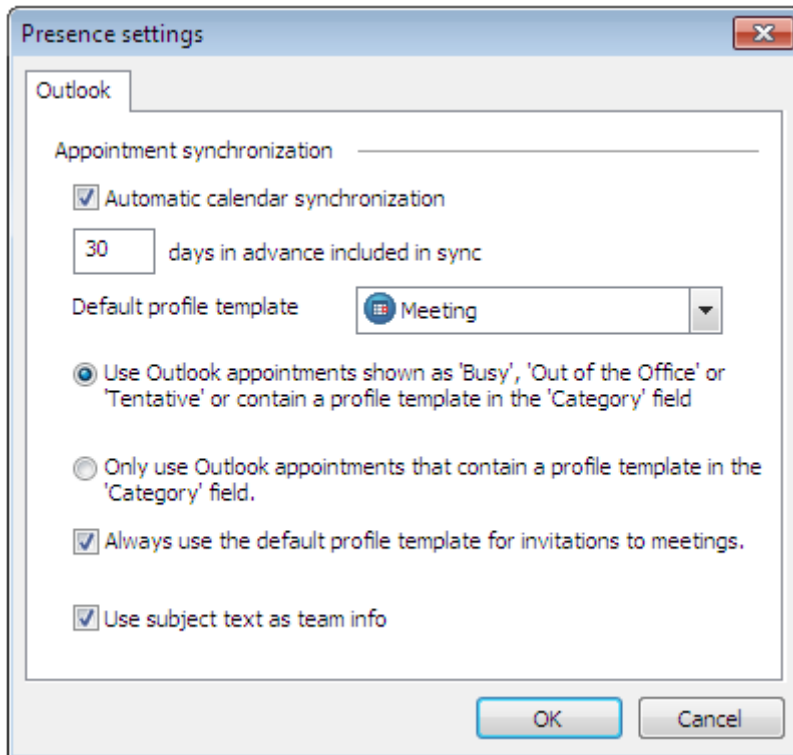
If you enter appointments in your Microsoft Outlook or Lotus Notes calendar, you can also automatically control profile templates with call forwarding and/or team infos. XPhone UC Commander automatically synchronizes with your calendar and imports appointments to your XPhone UC Commander interface according to your preferences.

XPhone UC Commander activates the appropriate profile template when your appointment begins. And, if you have configured the profile template with call forwarding and/or a team info, both are automatically activated. As soon as your appointment is over, XPhone UC Commander automatically resets the settings.

Activating appointment synchronization

- a) Click <<Select profile template>> to open the template dialogue.
- b) Select **Profile templates**
- c) Click **Calendar options** under **Scheduled in Outlook / Notes calendar** in the **Activate profiles automatically** section.
- d) Then activate the **Automatic calendar synchronization** checkbox and specify how many days in advance you want XPhone UC Commander to synchronize your appointments. XPhone UC Commander also recognizes and imports new appointments shortly after they have been entered.
- e) Select the profile template to be activated when XPhone UC Commander imports an Outlook / Notes appointment.
- f) Decide whether you want to import all appointments in your calendar or whether only appointments are to be shown which you have assigned to a certain category when entering in Outlook / Notes.
- g) Next, decide what you want XPhone UC Commander to do if the meetings weren't created by you, but were generated when you accepted someone else's meeting request.

- h) Specify whether you want XPhone UC Commander to import the text from the subject line in your appointment entry. If you don't activate this option, XPhone UC Commander discreetly indicates that you are away, showing only the text entered in the profile template. If the option is activated, every team member will be able to read the subject line.



Selecting categories in Microsoft Outlook / Lotus Notes

If you have selected the "Only use Outlook/Notes appointments that contain a profile template in the 'Category' field" option, XPhone UC Team Panel only shows appointments to team members if they are assigned to a certain category. When XPhone UC Commander is installed, it automatically integrates new categories in your groupware client's selection list in the following format: @xxx, e.g. @Out of Office.

Tip: Set the Meeting profile template as the default profile for your appointments, and configure call forwarding for it. That way, all your calls will be forwarded whenever you have an appointment without requiring any intervention on your part.

Viewing appointment lists

To see a list of all the upcoming appointments imported to XPhone UC Commander, click <<Select profile template>> and then select the **Show appointment list** option. The appointment list contains a summary of the appointments imported from the Groupware calendar system and which appointments are still active. Appointments can be deleted permanently or activated/deactivated temporarily here.

Appointment lists are useful if you wish to view, delete or activate appointments for another team member (and you have the permissions to do so).

Please note that when the software re-synchronizes with Outlook or Notes, the inactive appointments are not overwritten, since this could mistakenly re-activate them. This function is used when you do not want certain Outlook or Notes appointments used in presence management. If an appointment has been saved by a representative, this is also visible in the appointments list.

7 Team features

XPhone UC facilitates collaboration with colleagues by means of a range of practical functions such as:

- Displaying presence information
- Setting presence statuses and info messages for representatives
- Fast call forwarding
- Showing when a user is **Available again**
Operation is via the **Favourites view**.

7.1 'Favourites' view

The Favourites view contains contacts with whom communication is frequent. The view comprises:

- Contacts in one of your teams: Teams are formed by the administrator and cannot be edited by the user.
- Myfavourites: contacts you have added to the Favourites view from one of your address books. Please note that you can only add contacts entered in an address book. The contact data is imported to the view when the contact is added. The display data is re-synchronized with the address books when you execute the **Data synchronization** function which can be found under the **Favourites** button.
- Recent contacts: this display group is automatically filled with the last 50 contacts whose phone numbers can be assigned to a contact and who are not in one of your teams or My favourites.

Contacts can be added to My favourites from various other views:

- Journal if the caller has been identified.
- Contact view
- Call manager if contact data is available.

Contacts are added via the **Add to favourites** menu item in the contact's Context or Action menu.

Tip: Drag & drop the contacts into the desired group in the Favourites view. Please note that contacts cannot be added to teams.

7.2 Team features

The Favourites view makes it possible to execute certain functions on other contacts. Do this by opening the Context menu for an entry in Favourites:

- Presence functions – Setting presence status, Viewing appointment list, Setting team info, Setting company-wide info message.
- Transferring calls – If a call is assigned to your number, it can be directly transferred to one of your favourites.
- Available again – XPhone UC indicates the renewed availability of contacts who were on the phone or unavailable.

Tip: Drag & drop contacts to be indicated upon "Available again?" into the Info manager (bottom left section of screen).

7.3 Instant messages

XPhone UC Commander enables you to contact team members by instant message.

This is particularly useful whenever you are on the phone and need to get some information from another colleague as quickly as possible. With XPhone UC Commander, all you have to do is click <<Send instant message>> in your colleague's team key actions, and you can get the information you need without having to make a consultation call.

Sending instant messages – Favourites view

- a) Open the Favourites view in XPhone UC Commander.
- b) Right-click on the colleague's entry to open the Context menu.
- c) Click <<Send instant message>>. A new window opens for instant messages.
- d) Check whether your colleague can receive instant messages (green IM icon).
- e) Type your message in the editing field of the message window and press Enter to send the instant message.
- f) The message window now shows the text that you have sent.

Sending instant messages – Call manager

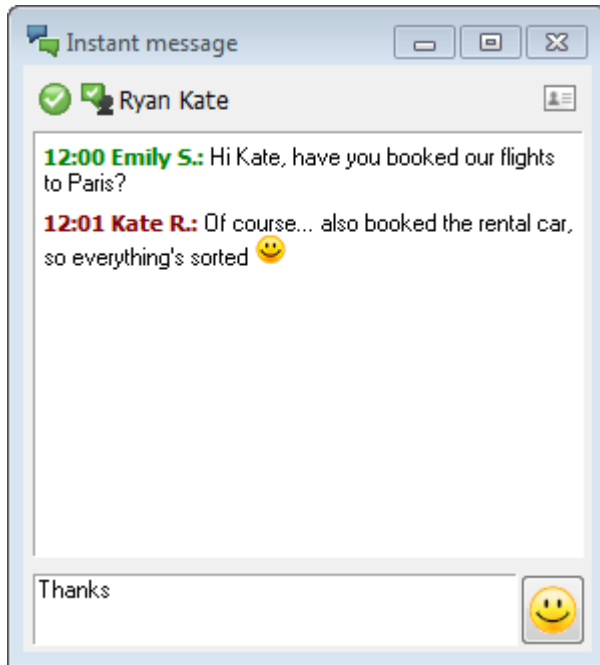
If you are already talking to a team member, it is sometimes useful to send an instant message in parallel, e.g. a link.

- a) Click the IM icon in the call manager. A new window opens for instant messages.
- b) Check whether he or she is able to receive instant messages (green IM icon).
- c) Type your message in the editing field of the message window and press Enter to send the instant message.
- d) The message window now shows the text that you have sent.

Receive instant messages

If a colleague sends you an instant message, a window containing his/her message opens automatically.

The contents of the message window is deleted as soon as you close XPhone UC Commander.



8 Connecting databases

8.1 Personal address book

XPhone UC Commander installs a personal address book if so selected during setup in the assistant and the administrator has not designated any server-controlled configuration. This is a Microsoft Access database. The personal address book is ready for use and does not need to be configured.

8.2 Creating new databases

- a) Open **Tools -> Address books**.
- b) Select the option **Link new address book to an empty database**. A new empty database is created. This database is created as an Access database in the user directory (**Application data -> XPhone UC Commander**) of the user who is logged on, and can now be filled.

8.3 Linking existing databases

- a) Open **Tools -> Address books**.
- b) Click **New address book** and select the option **Link already existing database to the new address book**.
- c) Enter a name for the address book.
- d) Determine the database type in the drop down list that appears.

8.3.1 Linking XPhone Virtual Directory

- a) Select **Virtual Directory**. The **Properties for address book** window opens.
- b) If you have activated the **Primary Commander address book client interface** option in XPhone Virtual Directory for the XPhone UC Commander Client Interface, activate the **Use primary client interface** checkbox. The settings for the server connection are automatically imported from XPhone Virtual Directory.
- c) In the **Data source** field, select whether the contact data is to be searched for in all data sources or only in a certain data source. All data sources are searched by default.
- d) Click **<<Test connection>>** to check whether XPhone UC Commander is able to set up a connection to XPhone Virtual Directory.
- e) Confirm with **OK**. You have added XPhone Virtual Directory as an address book.

8.3.2 Linking Access databases

- a) Select **Access database**. A dialog window opens.
- b) Enter the required address database and confirm with **OK**. The **Properties for address book** window opens.
- c) If the database consists of multiple tables, select the required table from the **Table** drop down menu.
- d) Now link the fields for your database. For more detailed instructions, see the following section on Creating field links On page 41.

Hint: If the contact data and phone numbers are in different tables in your database, you should create a query that assigns the fields to one another. Phone numbers must be in one field and may not be separated into two different fields.

8.3.3 Connecting ODBC data sources

ODBC interfaces enable access to different database formats, such as SQL, MySQL, Oracle and so on. This requires a specific ODBC driver that is supplied by the manufacturer or the database or by another manufacturer. ODBC drivers are proprietary and are configured according to the instructions of the manufacturer. Once you have installed the ODBC driver on the PC, you must create a system DSN in **Control Panel -> Administrative Tools -> Data Sources (ODBC)**.

- a) Once you have successfully created the system DSN, you can select the data source you created from the **Machine Data Sources** tab in the **Data Sources (ODBC)** database type in XPhone UC Commander.
- b) You will then see the **Properties for address book** window. Select the required table or query from **Table** and make the field links here. For more detailed instructions, see the following chapter Creating field links On page 41.

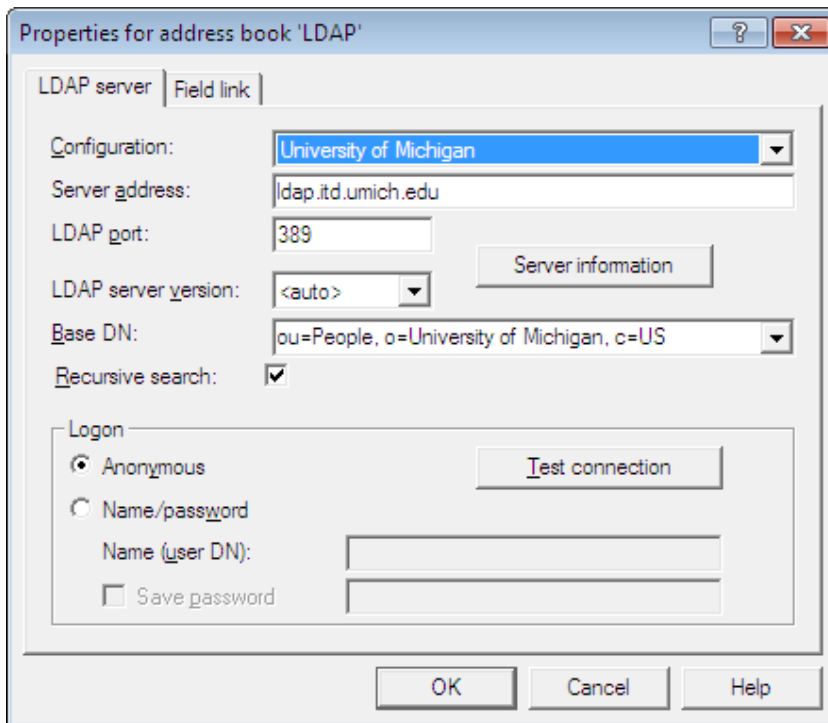
Note: If you create a database through an ODBC data source at a model workstation, you must ensure that the ODBC data source is created as the system DSN on the target workstations as well before importing the configuration. The system DSN is not deployed to the workstations through the sample configuration; you have to create it manually. If no standard ODBC driver is available from your operating system (e.g. Oracle databases), an additional ODBC driver must be installed on the system.

8.3.4 Linking LDAP directories

LDAP (Lightweight Directory Access Protocol) is a protocol that supports a directory service. Unlike data bases, LDAP directories are based on a tree structure, such as Novell Groupwise or Microsoft Active Directory.

- a) Select this file type. You can now access a number of predefined settings from the **Configuration** drop down menu.
- b) Complete the settings in the listed fields. The settings for the server address and the ports are individual.
- c) Go to the **Base DN** field and define the areas of the LDAP structure that are to be accessed. If necessary, you can change the default field assignments in the **Field link** tab, but you will not usually need to do this.

If you use the **Save password** option for authentication with name/password, the programme encrypts the password and files it in the Windows registry. This process only offers limited security. You should not therefore use passwords here which are also used elsewhere (e.g. for domain login).



8.3.5 Linking Microsoft Outlook contact folders

You can link public and local Microsoft Outlook folders as well as personal folders to XPhone UC Commander.

Select the required contact folder and confirm with **OK**. You do not need to make any more settings in the **Properties for address book** window, unless you wish to change the default field links. For more information, read the next chapter, Creating field links On page 41.

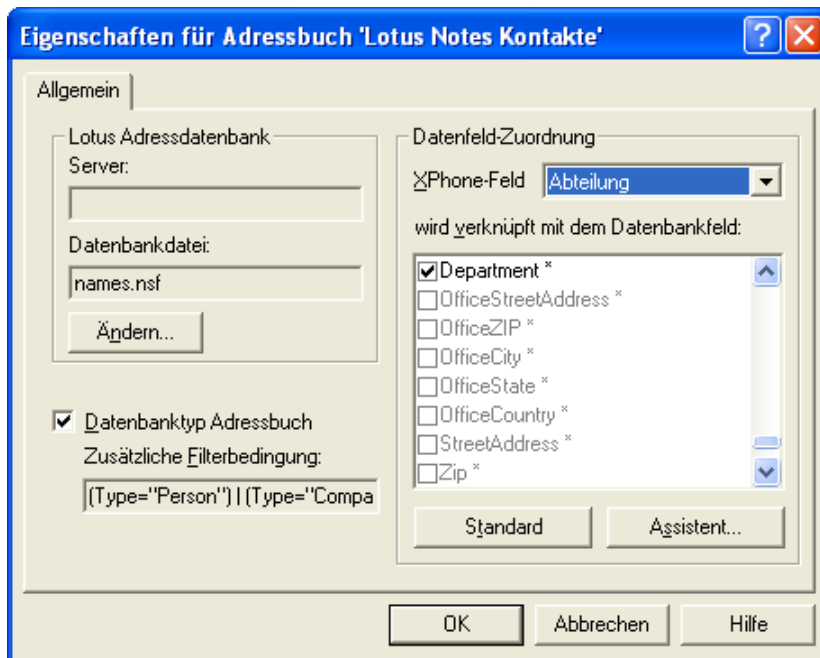
8.3.6 Linking Lotus Notes address books

- Select the value **Lotus Notes address book** as the database type. The **Properties for address book** window opens.
- Use **Change** to select the required Notes address book.
- You can link local address books and address books from the Domino server to XPhone UC Commander. Read the next chapter, Creating field links On page 41, if you want to change the default field links.

If a message appears telling you that not all components are available for connection to the database when you select the Lotus Notes address books database type, you should proceed as follows:

- Open **Control Panel->System->Advanced->Environment Variables**.
- Select the variable **Path** from the bottom section and click **Edit**.
- Enter the path to the **notes.ini** and **notes.exe** files, e.g. **c:\lotus\notes** and separate them with a semicolon. If these files are in different directories, enter both paths one after the other and separate them with a semicolon (;).

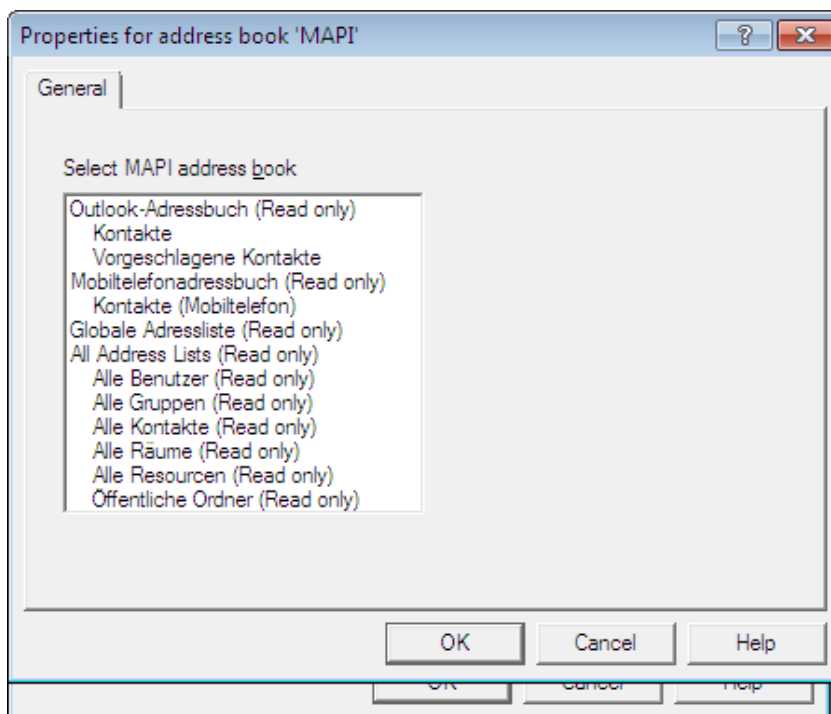
Hint: If multiple employees access a central Lotus Notes database, this may delay the caller ID. You can use the **XPhoneSearchPhoneNumber** view for the address book template to avoid these delays. Select the Lotus Notes address book in the XPhone Unified Communications interface and open **Properties** in the context menu. Go to **Other settings** and select the check box **Use this view for caller identification: XphoneSearchPhoneNumber**. XPhone UC Commander searches through the contact data records in the indexed view instead of in the entire database.



8.3.7 Linking MAPI address books

You can use the MAPI interface to access global address books on your Exchange server, for example.

- Select the MAPI database type. The **Properties for address book** window opens.
- Select the required address book and confirm with **OK**; no further settings are required.



8.3.8 Linking a Windows Address Book (Outlook Express)

When you select the **Windows Address Book** -> **Outlook Express** database type, you see the window **Properties for address book**. No further settings are required.

8.3.9 Linking Telefonbuch Deutschland

- You may only use editions of *Das Telefonbuch Deutschland* starting in **Spring 2006**.
- Select **Das Telefonbuch Deutschland** as the database type.

c) Das Telefonbuch Deutschland can be used in the following configurations:

a) Workstation version: Insert the Das Telefonbuch Deutschland CD in a local drive. You only need to install *Das Telefonbuch Deutschland* if you also want to use the software contained on the CD. Provide the drive letter of the CD-ROM drive in **Directory with the phone book data** in XPhone. Remove the checkmark from **Network/intranet version**.

b) Network version: Install *Das Telefonbuch Deutschland* on a PC that other users can access over the network. In the *Das Telefonbuch Deutschland* installation program, select **Workstation/network version**. Use the license code that you received with Das Telefonbuch Deutschland. Then share the installation directory in the network. Enter the shared directory in **Directory with the phone book data** in XPhone, for example:

\\<Server>\TVG\DasTelefonbuch Deutschland.

d) You can specify whether this address book should be excluded from a search in **All address books**. This is advisable as it could take a very long time to search so much data. If you are mostly searching for employees and company contacts from your other linked address books in the call manager, you may delay the searches unnecessarily if you additionally search the Das Telefonbuch Deutschland CD. For this reason, this option is activated by default. To search through the data on the Das Telefonbuch Deutschland CD, select this address book and search only in it. If you have only saved a few contacts in personal address books and are mainly interested in the Das Telefonbuch Deutschland data, you should deactivate this option.

e) Confirm your settings and restart XPhone UC Commander.

Hint: you can use advanced searches in *Das Telefonbuch Deutschland*: if employees from another company call and present their full caller ID (number with extension), *Das Telefonbuch Deutschland* recognizes the underlying basic phone number and correctly identifies the company in its database.

8.3.10 Linking the TwixTel phone book for Switzerland

- Select **TwixTel phone book for Switzerland** as the database type.
- Specify the directory for the TwixTel data in the next dialog (e.g. \\yourserver\TwixTel).
- You can also specify whether this address book should be excluded from a search of "All address books". This is advisable as it could take a long time to search all this data. If you are mostly searching for employees and company contacts from your other linked address books in the call manager, you may delay the searches unnecessarily if you additionally search the TwixTel CD. For this reason, this option is activated by default. To search through the data on the TwixTel CD, select this address book and search only in it. If you have only saved a few contacts in personal address books and are mainly interested in the TwixTel data, you should deactivate this option.

Hint: you can also search for a contact using a phone number with the linked phone book CDs. If, for example, you see an unknown number on your mobile phone's display, you can identify the caller using the inverse search.

8.4 Creating field links

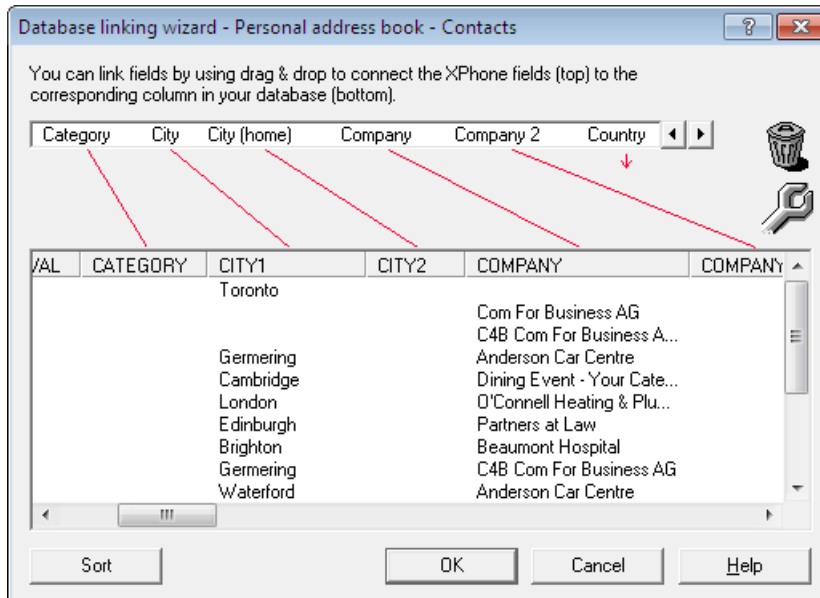
XPhone UC Commander can only assign the individual contact fields properly if you link the fields when you connect the database. Microsoft Outlook and Lotus Notes databases already have default field links in XPhone UC Commander. You can of course change the default links for Microsoft Outlook and Lotus Notes address books in the **Properties for database** window.

There are two ways to link the fields:

- Select the required XPhone UC Commander field in this window and link it by activating the corresponding check box in the database field. You should at least link name and phone number fields. If you wish to use the messaging module in future, you must also assign all address fields.

- b) You can also use the visual wizard. To do this, click the **Wizard** button and connect the XPhone UC Commander and database fields by drag and drop, by holding the mouse button and linking the two values. A red connection line shows which fields have been linked.

Note: XPhone UC Commander can only identify contact data records correctly if they have been assigned a primary key: Select the XPhone UC Commander field **ID1** and assign it to a unique field in your database, e.g. a customer number. The values in this field of your database must be unique. If there are no unique fields in your database, you can link fields from your database to the **ID1 ID2 ID3** etc. fields in XPhone UC Commander, and thereby create a unique primary key consisting of multiple fields.



8.5 Moving and deleting address books

You can determine the order in which the linked address books are displayed and searched during caller ID.

- Go to **Tools** and select **Address books**.
- Select an address book and use the arrow keys to move it to another position.
- Click **Remove** to remove an address book from XPhone UC Commander. This only deletes the link, not the original data source. You can also delete Microsoft Access databases completely.

Hint: If a caller is identified from a linked phone book CD, you can copy the entry and transfer it to one of your own address books by clicking <<Open contact>>.

8.6 Searching for address book entries

You can search for contacts in individual address books or in all linked address books simultaneously.

- Select an address book. To search in all address books, select **All address books**.
- You see all contacts in an address book. The default number of contacts listed by XPhone UC is 100.

Tip: You can also view more than 100 contacts. Move the mouse to the column header and open the context menu. Select **Select column** and **Search fields**. Enter the number of contacts that you wish to be displayed simultaneously.

8.7 Free-text search

Joint use of XPhone UC Commander and XPhone Virtual Directory permits a free-text search in the address books which are linked. If only XPhone Virtual Directory address books are linked to the XPhone UC Commander, the free-text search is also possible via [All address books](#).

The free-text search enables several search terms to be entered which are searched for in all fields indicated by XPhone Virtual Directory. The search term entered is broken down into individual search terms. Spaces and commas are used to separate the individual words.

Hits in at least one field require that all search terms are found in a word on the left. A word is recognized as such if it is at the beginning of a field or preceded by a space.

The search performance can be influenced by

- entering the "*" symbol ahead of a search term. In this case, the search term may also be within a word (i.e. the flush left feature is not a must)
- entering the "-" symbol ahead of the search term. In a hit, no word in a field may start with this search term.
- entering the "-*" symbol ahead of the search term. In a hit, no word in a field may contain this search term.

The search does not take consideration of upper/lower case letters.

If a blank search term is entered, all of the contacts are returned until the maximum number of hits set is reached.

Example: Search for all contacts containing the term 'kramer' but not containing the term 'mün'. Entry: *'kramer -mün'*. This entry would be used to search for all contacts called "Kramer" who do not live in "Munich", for example.

The free-text search is activated in the Contact view under the [Options](#) button or [Tools/Options/Contact search](#).

8.8 Full text search

A full-text search can be performed even if XPhone Virtual Directory is not used. Depending on the address book type, the search performance can however be restricted.

- a) Select an address book. Search all address books by selecting [All address books](#).
- b) Activate the [Full-text search](#) checkbox and enter any search term. All fields (including note fields) of the contacts in the selected address book are searched through.
- c) Click the desired phone number in the search result to start a call.

8.9 Searching using search criteria

8.9.1 Defining search criteria

- a) Click [Search](#) under the entry field in the top right-hand area of the full view.
- b) The mask which opens offers the following setting options:
 - [Visible columns](#): Specify the contact fields that should always be displayed. Use the arrow keys to change the display order.
 - [Search fields](#): Specify the criteria you want to search for in the contact data records. You can enter as many criteria as you wish. Specify the order of search criteria using the arrow keys.

If the free-text search is activated, it is not necessary to specify the search criteria as all of the fields indicated are searched by the XPhone Virtual Directory.

8.9.2 Entering search criteria

If you know that your search term is located in a specific database field, it is advisable to search by search criteria. To do this, you must first specify the criteria you want to search for in the address book(s). You can define different search criteria for each linked address book, and these settings are retained until you change them.

- a) Enter your search term(s) in the entry field. You can refine the search by specifying multiple search criteria. Use commas (,) to separate search criteria from one another. You do not need to enter a space after the comma. Please enter the search criteria in the order you defined earlier (see Defining search criteria).
- b) Start the search by clicking **Start search** or pressing Enter.

Example: You have defined last name, first name, company as search criteria. To find Carsten Müller from the Mustermann company, carry out the search as follows:

- Müller: returns all contact data records whose last name is Müller
- Müller, Carsten: returns all contact data records whose last name is Müller and whose first name is Carsten
- , Carsten: returns all contact data records whose first name is Carsten
- , , Mustermann: returns all contact data records whose company name is Mustermann
- Müller, , Mustermann: returns all contact data records whose last name is Müller and whose company name is Mustermann

No search criteria are used when a free text search is activated.

8.9.3 Manual phone number id (inverse search)

- a) If you wish to check whether a phone number exists in a connected database, or to which contact it belongs, enter it into the entry field.
- b) Now click on <<Prepare call>>. If a linked contact database contains a corresponding contact data record, XPhone UC Commander automatically completes the data.

8.9.4 Adapting address book columns

You can change the width of the columns in the search results. Move the mouse over the column header and use the context menu to open the **Rename columns** function in order to change the column name. The function described in Defining search criteria is also available in the context menu.

You can change the order of the columns using drag & drop.

8.9.5 Sorting search results

The search results are sorted by the column you selected most recently. You can, however, change the order. There are two ways of doing this

- Sort by columns. To do this, click on the column header. The search results are sorted alphabetically by this column.
 - Grouping function:
- a) Move the mouse to the column header and open the context menu.

- b) Activate the **Group field** function. An additional line appears above the search result.
- c) Pull the column header that you wish to sort the search results by into this line.

8.10 Searching in Das Telefonbuch Deutschland

The *Das Telefonbuch Deutschland* search engine behaves differently in some aspects than the search engine for the other address books. The following is a list of hints for a successful search:

Search by city name

- The search engine first checks whether there is a city that corresponds exactly to the name in the city field. If this is the case, the search is only carried out in this city, e.g. **Mannheim**.
- If the city is not unique, e.g. **Frankfurt**, the search engine searches through all cities that start with **Frankfurt**. The results return contacts from Frankfurt am Main and Frankfurt Oder.
- The search only restricts itself to a city if at least one field relating to a city is filled in; otherwise, the search engine searches through the whole of Germany.

Field conditions

- **Post Code**: You must enter at least 2 characters when searching for a post code (e.g. **80**).
- **City**: You must enter at least 2 characters when searching for a city (e.g. **Ma**).
- **First name**: You can not search for a first name without entering a last name.

Search for phone number

To search for a phone number, enter the dialling code and the phone number without brackets and without a preceding **+49**.

Please note that for legal reasons you can only search for a phone number if the owner of that number has not forbidden this type of search.

Additional names

- Additional names are not indexed and are therefore not found in combination with a city search.
Example: A subscriber has the following entry:

Müller, Carsten and Schmidt, Britta; Musterstr. 1, 12345 Musterstadt

In this case, **Britta Schmidt** is an additional name. If you search for **Müller,Carsten** or **Müller,Carsten,Musterstadt** or **Schmidt,Britta**, the search will return this entry; if you search for **Schmidt,Britta,Musterstadt** it would not return this entry.

- The search engine returns no more than 75 hits. If the required entry is not returned, you should refine the search term.

Phonetic search

The phonetic search also returns results that sound the same but are spelled differently; if you search for **Meier**, the search will also return **Maier**, **Meyer** or **Mayr**.

Full text search

You can only do a full text search in the **Last name** field.

8.11 Searching in the TwixTel phone book for Switzerland

The *TwixTel phone book for Switzerland* search engine behaves differently in some aspects than the search engine for the other address books. The following is a list of hints for a successful search

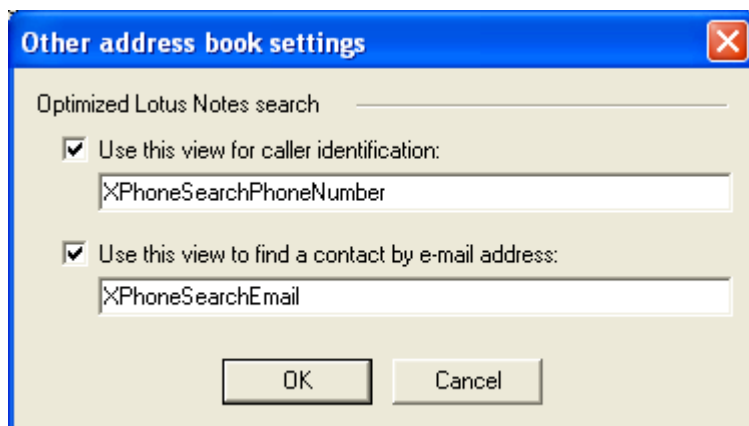
- The search engine does not return any hits if it finds more than 999 hits. You should refine the search term.
- A full text search searches in names, categories and industry information.

- To search for a phone number, enter the dialling code and the phone number without brackets and without a preceding +41.

8.12 Optimizing the Lotus Notes contact search

If you use a central Lotus Notes database that is accessed by multiple users, this can affect the performance of caller ID. You can avoid this by using two additional views for the address book template, which are supplied along with XPhone UC Commander and concentrate the search for information in selected Lotus Notes database fields.

- Select the required Lotus Notes address book in the XPhone Unified Communications interface, right click to open the context menu and select **Properties**. If you are connecting the Lotus Notes address book at this time, the **Properties** window opens automatically when you specify in **New address book** that you wish to link to an existing Lotus Notes contact folder.
- Click on **Other settings**.
- Select the check box **Use this view for caller identification: XphoneSearchPhoneNumber**. XPhone Unified Communications now searches through the contact data records in the indexed view instead of in the entire Lotus Notes database when a call comes in.
- Activate the check box **Use this view to find a contact by e-mail address: XphoneSearchEmail**. XPhone Unified Communications now searches through the contact data records in the indexed view instead of in the entire Lotus Notes database when you search for the contact matching the e-mail address.



8.13 Copying contacts to the speed dial list

- Mark an address book entry in the search results.
- Open the Context menu and select **Add to favourites...**
- Select the target group to which you wish to add the contact.

8.14 Scheduled calls

You can create a call reminder for a contact data record you have found. You will then be reminded of the call on time; if you wish, dialling can even be started automatically at a certain time.

- Select an address book entry in the search results.
- Open the context menu and select **Create scheduled call/alert**.
- Specify when and how often you wish to be reminded of the call.
- You can also add a note on this call reminder.
- The entry is automatically attributed **Pending** status and marked using the calendar symbol. This note is also shown.

- f) To activate or deactivate the call reminder, open or close the corresponding option in **Tools ->Scheduled call reminder**.

8.15 Creating call lists

If you wish to make several calls in succession, you can create a call list.

- a) Select the respective contacts in your address book list by holding the **Ctrl** key and clicking the individual contacts.
- b) Use the drag & drop function to enter the entries in the **Pending** journal folder or open the context menu and click **Other functions** and select **Create scheduled call/alert**.
- c) Enter the desired time. When the specified time arrives, XPhone UC opens the call reminders for each contact in sequence.
- d) All scheduled calls are automatically listed in your **Pending** journal. Once you have made a successful call, the status is changed to **Completed**. This way, you can always tell which parties you were not able to reach. You can also call the party from the call reminder directly.

8.16 Copying contact data records to other address books

XPhone UC enables you to copy contact data records from one address book to another. The original format of the contact data is of no importance. Please note that changes to the original contact are not automatically made in the copy.

- a) Select an address book entry
- b) In the context menu, select **Other functions/Copy to>**.

8.17 Creating new address book entries

You can create a new address book entry from a call or journal entry if the contact is not already saved. The entry is automatically saved in the original data source.

- a) Select the journal entry or click on <<Create new contact>> and select the address book from the drop down list.
- b) The XPhone UC Commander entry window opens. Enter the required contact data. The phone number has already been initialized. If you selected a Microsoft Outlook contact folder, the original Outlook contact window opens.
- c) When you save the new address book entry it is stored in the original data source.

8.18 Copying a new phone number

You can copy a new phone number directly from a call or a journal entry to an existing address book entry.

- a) Select the entry from the journal and open the context menu with the right mouse button.
- b) Now click on **Assign phone number**. The action dialog opens. Enter the name you are searching for into the entry field **Search term**.
- c) Click on **Start search** to call up the required address book entry. All phone numbers for that entry are displayed.
- d) Specify whether you are replacing an existing number or want to add a number to the entry.

8.19 Printing the address book view

Go to **File -> Print** to print the current address book view.

9 Caller ID

9.1 The caller ID function

When the telephone rings, XPhone UC Commander identifies the caller using the received phone number. This is only possible if there is an address book entry for this contact and the address book is connected to XPhone UC Commander. The advantage is that this information is available to you before you begin the call, and that you can prepare yourself for that caller. There are different ways of viewing information on the caller.

- Open **Tools -> Options**.
- You can now set the type of caller ID and the conditions. There are three types of caller ID that can also be used together. They are described in the following section.

9.2 Caller ID via popup

- a) Go to **Tools> Options** and select **Caller popup**.
- b) Configure the conditions for caller ID via caller popup.

Hint: The caller popup is similar to the compact view and is the recommended default setting for caller ID, as you can access all available telephone functions before the call begins.

Display caller ID

The name of the caller is displayed as default. You can also specify whether additional information is displayed. You can select all existing database fields. Customized database fields are also available.

- a) Go to **Tools -> Options** and select **Call manager**
- b) Go to **When calling: Display detailed view of caller's data** and select whether the additional information is to be displayed. If this check box is not selected, you can get the information by clicking on the + icon in the popup.
- c) You can now specify the information that is to be displayed about the caller. Use the arrow buttons to specify the order in which the fields are displayed.

Hint: You can also open the corresponding contact data record by mouse click from this view.

Display called ID

If calls were forwarded or picked up, XPhone UC Commander can display the called ID as well as the caller ID; the called ID shows who the caller was actually calling. This only works if an address book containing the phone numbers of employees is linked to XPhone UC Commander.

- a) Go to **Tools -> Options** and select **Call manager**
- b) Use the **Called party** check box to specify whether you wish to see the information on the person who was originally called.
- c) Once you have activated the check box, select the information on the called ID that you wish to see. Use the arrow buttons to specify the order in which the fields are displayed.

9.3 Caller ID via contact data record

- a) Go to **Tools ->Options** and select **Caller popup**.
- b) Configure the conditions for the opening of the contact data record.

Hint: XPhone UC Commander always accesses the original database entry. Changes made in this view are saved in the original data source.

Opening Microsoft Outlook / Lotus Notes contacts

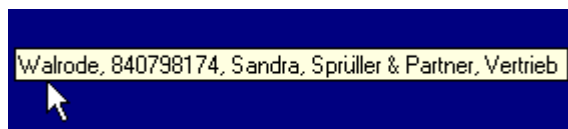
XPhone UC Commander contains add-ons for integration in Microsoft Outlook or Lotus Notes. (see Integration in Microsoft Outlook and CTI Integration in Lotus Notes). If you use the Outlook add-on or Notes add-on and the contact data record for the caller is saved in a Microsoft Outlook or Lotus Notes contact folder, that folder opens automatically if you configured this option in caller ID. Please note that this option only works if the following requirements are met:

- The contact must exist in a Microsoft Outlook or Lotus Notes contact folder. The phone number of the caller must be entered in one of the phone number fields in this contact data record.
- The **Last name** field in the contact window may not be empty. Check this by opening the contact and clicking on **Last name**.
- The contact folder containing the contacts of prospective callers must be linked to XPhone UC Commander.
- Go to XPhone UC Commander and select the option **Tools -> Address books->New address book**.
- Enter the name that XPhone UC Commander should display for the address book in the **New address book** window. Select **Use existing database** from the lower part of the window and then select the option **Outlook contact folder** or **Notes contact folder**. The next window is where you select the contact folder you wish to connect to. You can confirm the next window, **Properties for address book...**, without making any other entries by pressing **OK**.

9.4 Caller ID via tooltip

The caller tooltip is the discreet version of caller ID. A tooltip containing the selected information on the caller appears next to your cursor.

- Open **Tools -> Options**.
- Open the **Caller tooltip** and specify the conditions for the appearance of a tooltip.
- Specify the information you wish to see. If you select the **Default** option, you will see the last name and phone number of the caller.
- If you wish to see additional information, select the corresponding database fields. Use the arrow buttons to specify the order in which the fields are displayed.



9.5 Deactivating caller ID

You can deactivate caller ID and called ID (see Caller ID via popup) for individual address books.

- Go to **Tools** and select **Address books**.
- Click **Caller ID...**
- Select the address books for which you wish to deactivate the

■ Caller

■ Called party

ID and press OK to confirm.












Hint: If you have connected *Das Telefonbuch Deutschland* and/or the *TwixTel phone book for*

Switzerland, caller ID may take longer than usual. You should deactivate caller ID for these address books if you wish callers to be identified from your connected address books.

10 Call journal

10.1 Icons in the journal

Calls in the journal feature symbols to facilitate explanation of the call status:

-  Outbound call – Connected
-  Inbound call – Connected
-  Outbound call – No connection
-  Ringing
-  Missed call
-  Call in progress
-  Call has been picked up or redirected
-  Call has been picked up or redirected, destination unknown
-  Call waiting
-  Other calls
-  Scheduled call

10.2 Logging calls

XPhone UC Commander logs all calls in journal folders. The arrow icon next to the call entry shows whether the call was inbound or outbound (see also the XPhone UC Commander ShortGuide).

10.3 Searching and filtering in the journal

The journal shows all calls made using your telephones (provided they can be monitored by XPhone UC Server).

It also includes calls made while your computer was off.

You can limit the selection of calls shown by setting filters.

It is possible to enter one or more search terms in the entry field at the top right of the Journal view. The search covers the contact fields associated with a phone call (last name, first name, company, department) as well as notes and phone number.

10.4 Logging missed calls

Calls that you missed during an absence are logged in the **Missed calls** journal and flagged as <<Missed calls>>. Calls are always logged, even if your PC is not switched on. This is also true if your calls are forwarded to another phone, provided the forwarding destination is another team member's line. In addition to this, you can also see if and who picked up the call. (see also the XPhone UC ShortGuide)

New missed calls are also indicated the next time you boot your PC or when you return to your

workstation in the form of

- a red exclamation mark in the corresponding journal icon
- a tool tip in the icon tray at the bottom right of your screen
- an entry in the info manager (bottom left of screen).

10.5 Dialling from journals

You can return the call by double-clicking the journal entry. If you do not reach the party under the number in the journal, you can use the context menu to call an alternative phone number. This is only possible if the additional phone numbers were saved in the contact data record.

10.6 Editing journal entry statuses

Select an entry in the journal and select **Mark as completed** or **Mark as pending** in the entry's Context menu.

10.7 Creating alerts and call reminders

XPhone UC can remind you of important phone calls.

- a) Select the entry from the journal and open the context menu with the right mouse button.
- b) Select **Create scheduled call/alert**.
- c) Alternatively, you can also select an address book entry and the **Create scheduled call/alert** option in the context menu.
- d) Enter your comments in the text field. You have saved a note on your entry.
- e) Activate the **Call reminder** check box to start an automatic call reminder and specify when and how often you wish to be reminded.
- f) The symbol to the left of the journal entry has changed. If you have saved a note, the note symbol will appear in the second-last column. The alert is also shown in the journal and can be edited.

10.8 Recycle bin

XPhone UC Commander saves call entries for 90 days as default before attributing them **Recycle bin** status. You can however specify how long the call entries are to be saved.

- a) Open **Tool -> Options**.
- b) Select **Call journals**
- c) Specify when the journal entries are to be moved to the **Recycle bin** folder.

Hint: Empty your journals regularly to prevent XPhone UC from being overloaded with unnecessary data. If you wish to save entries for longer periods of time, you can archive them (see section on Archiving journals).

10.9 Archiving journals

You can archive your journal entries in an external file. This is saved in the CSV format and can be imported into Microsoft Excel or Microsoft Access among others.

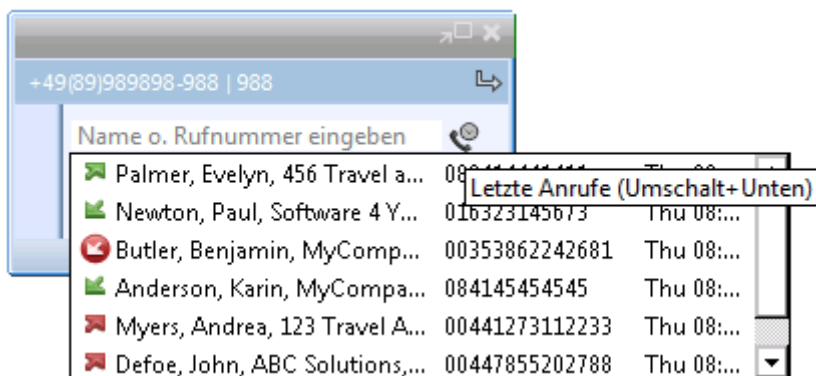
- a) Open **File -> Archive call journal**.

- b) Activate the **Archiving function on** check box and specify the call entries you wish to archive.
- c) Specify whether the call entries should be created in an Excel-optimized format.
- d) Specify whether archiving should be done when you close the program.
- e) Enter a name for the archive file.
- f) Click the ... button to specify the storage location for the file.
- g) Press **OK** to confirm.

Hint: A CSV file can be made available to multiple users. This makes it possible to save journals centrally.

10.10 Compact journal

You can also access the journal function from the compact view. XPhone UC Commander shows a compact journal in this view; the compact journal shows the last 20 calls, regardless of their status. If you select a journal entry, the corresponding phone number is transferred to the entry field and you can begin dialling.



10.11 Keeping journals in Microsoft Outlook

You can also have your calls logged in Microsoft Outlook. For more information on this subject, see Journaling in Microsoft Outlook.

11 Fax, Voicemail, Text message

11.1 Fax functions in XPhone UC Commander

11.1.1 Composing new faxes

Selecting recipients

Faxes can be sent to one or several recipients. There are two ways to select recipients:

- a) Click the **New** button and select **New fax**. The XPhone Fax dialogue opens. Click the **Search** button. The XPhone UC Commander Contact selection form opens. Find a recipient by entering the name or part thereof or the fax number. The XPhone UC Commander Contact selection form finds all the contacts stored in address books linked to XPhone UC Commander. Select the desired contact and select the contact's fax number on the **Fax** tab as only then can the recipient information be imported to the fax dialogue.
- b) In XPhone UC Commander, select the desired contact on the **Calls**, **Favourites** or **Contacts** tab. Click **Actions** and select **Actions -> Fax**. Select a template; the XPhone Fax dialogue opens and the **Subject & Message** is activated. The recipient information has been entered (if maintained for the selected contact). If several fax numbers are available, you will be requested to select one or more.

If you want to send the fax to someone on whom no contact information has been entered in your databases, enter the corresponding data in the Recipient details section as otherwise the recipient information stays blank on the fax cover sheet. Once you select a recipient with sufficient contact information from your contact databases, the data from the contact data record is entered in the fax header; you can leave the fields empty.

Entering text

The text you enter in the fax form's subject and message fields appears on the fax cover sheet, not in the actual fax message. A cover sheet is only generated if you have selected a template in the drop-down list.

In the drop-down list, you can choose between **No cover sheet** and various cover sheet templates. If you do not select a cover sheet, any information in the **Subject & Message** tab is ignored.

If you want to send the fax to someone on whom no contact information has been entered in your databases, click **Edit recipient details** to enter the corresponding data as otherwise the recipient information stays blank on the fax cover sheet. Once you select a recipient with sufficient contact information from your contact databases, the data from the contact data record is entered in the fax header; you can leave the fields empty.

Attaching files

Insert the file you want to fax in the fax form using the **Attachments** button. The file can have any format; for more information, see System requirements for XPhone Unified Messaging). The outbound file is immediately rendered and converted to .tif format, enabling you to check the appearance of the fax in the preview section before sending it (see section on Preview). Depending on the size of the outbound file, this may take a while.

11.1.2 Fax toolbar and editing options

Various fax settings can be made via the toolbar in the top section of the open XPhone fax dialogue. The cover page can not be edited for a newly created fax: only file attachments or faxes which have already been received can be edited.



Stamp note

Insert stamp note:

A stamp note can be inserted on a fax received or a fax generated with file attachment. Double-click the inserted "stamp" to edit the text. Functions for rotating or changing the size of the stamp are available with the "corner marks" or "green dot" above them.

Edit default stamp:

Default stamps can also be **newly** defined and **edited** via the dialogue which opens. An individual text can be entered and/or the spacers used.

Insert default stamp:

If default stamps have already been defined, they are listed first and can be inserted in a fax already received or in a new fax with file attachment. The order can be changed via the **Edit** button.

Insert text note

By positioning and holding the left mouse button, the size of the text field can be specified. The position and size can also be varied later via the "corner marks". A text field can be edited by double-clicking.

Highlight

Parts of a fax can be highlighted in colour. The respective area can be selected again by positioning and holding the left mouse button. The position and size of the highlighted text can also be varied later via the "corner marks". Please ensure that the colour can only be shown in the fax dialogue. Later in the fax, the highlighted area is only highlighted by a grey frame.

Zoom

Page width is preassigned by default as the zoom factor. This can be changed to **Full page**, **Page height** and various percentage zoom factors.

Rotate

File attachments can be rotated 90° clockwise.

Delete page(s)

Individual pages (including several at once) or all pages can be deleted.

Add file

A file browser opens via which one or more files can be added. One or more files can also be inserted

into the fax via Drag & Drop.

Save as new file

A fax can be saved anywhere as a new file in PDF or TIFF format.

Print

Opens the default print dialogue via which the printer and settings can be selected.

Select cover page

The preview for all cover pages available is shown here and from which you can make a selection. Select the requisite cover page for the fax which is then imported directly for the new fax. Your default cover page is preselected automatically (where available) and is also shown in the preview. If you select **No cover page**, any texts entered in the **Messages** tab are ignored in the fax message.

11.1.3 Scheduling

Click the **Options** button in the fax form (toolbar) to specify the transmission time and priority of the fax or printing settings.

Priority tab

Depending on the configuration by the administrator, you can decide the priority level for sending fax documents.

Choose between **High**, **Normal** and **Low**, whereby **Normal** is the default value.

Transmission time tab

The possibility of being able to determine a certain fax **transmission time** is a very convenient feature. This enables you, for example, to prepare multiple faxes and send them at a later time. Choose one of the following options:

- **As soon as possible**: The fax is sent as soon as the server load permits, generally immediately.
- **Economy rate**: If your company uses an economy rate, the administrator can define the best times to send faxes (e.g. at night) and store this information on the server. If this option is activated, the fax is automatically sent during the specified time frame. You no longer have to worry about sending the faxes at the most cost-effective time. If you select this option but no economy rate schedule is stored on the server, the fax will be sent **As soon as possible**.
- **Leave in the outbox (send manually later)**: The fax is not sent automatically but merely saved in the XPhone UC Commander fax outbox. To send the fax, go to the **Fax, Voicemail, Text message** tab, select the respective fax and select **Actions -> Send again**.
- **Date/Time**: The fax is sent automatically at the specified time without requiring you to do anything.

Sender tab

Your sender information is shown as transmitted to the recipient.

Advanced tab

Via the **Open print settings** button, you can open the fax printer driver print settings such as paper format, orientation or resolution.

11.1.4 Preview

A convenient fax preview function is available in the XPhone Fax dialogue. Depending on the size of the attached document, conversion into .tif format may take some time. When the conversion is done, the fax is displayed in the preview window exactly as the recipient will receive it.

Note: You can no longer edit the rendered fax document. If you need to carry out further changes, edit the original document (e.g. in Word), delete the fax document from the fax form and attach the original document again.

11.1.5 Sending faxes

In the XPhone Fax dialogue, click **Send fax**. The fax is sent to the XPhone Server and from there to the recipient. The fax sent is saved in XPhone UC Commander. To show the faxes saved, click the **Fax, Voicemail, Text message** tab in XPhone UC Commander and select **Outbox** from the drop-down list.

Depending on the options you have selected in the XPhone UC Settings for Fax under **E-mail confirmation** (see section on Fax), you will receive a confirmation e-mail in your Outlook inbox after it has been sent, possibly with the fax document attached.

11.2 Fax functions in Microsoft Word

11.2.1 Faxing with XPhone UC

If you have a document open in Microsoft Word which you would like to send as a fax to individual recipients, click **File -> XPhone Fax**. This opens the **XPhone Fax** dialogue.

The document in Word is immediately rendered and converted into .tif format enabling you to check the appearance of the fax before sending and remove individual pages if necessary. Depending on the size of the outbound file, this may take a while. Depending on the options you have selected in the XPhone UC settings for fax under **E-mail confirmation** (see section on Fax), you will receive a confirmation e-mail in your Outlook inbox after sending the fax, possibly with the fax document attached.

If necessary, edit the **Sending options** as described in the section on Sending options see "Scheduling".

Select one or more recipients and enter a text for the cover page as described in the section on Composing new faxes.

The fax can then be sent as described in the section on Sending faxes.

11.2.2 XPhone fax merge

To use fax merge in Microsoft Word, you must

- have the main document open
- have a data source which contains the names and addresses to be used for the fax merge
- insert fax merge fields in the Word document which serve as spacers for the data from the data source.

- create the fax merge document by inserting data from the data source into the fax merge fields in the main document.

If you start the fax merge without the above steps being performed successfully, you will receive the "The active document is not a mail merge source" error message.

The Microsoft Word fax merge manager guides you through the process. If necessary, consult the Microsoft Word help function for these steps.

As soon as the fax merge document has been created, you can start the fax merge by clicking the **Send fax merge** button in the **Transmissions** tab. The **Sending fax merge** dialogue appears. The following setting options are available:

General tab

Select the **Fax number from field**: to be used from the drop-down list and enter a **Subject**. You can prioritise the fax (analogue to the e-mail process) and select the transmission time. Fax options and transmission options (Outlook 2010).

Cover page tab

The cover page can be selected from the drop-down list if authorised by the administrator. Assign **first names, surnames, company names, departments** and **phone numbers** to the respective fields offered in the drop-down lists. A preselection has already been made. If a cover page has been selected, a message text must be entered. If you have not selected a cover page, the fields listed above can not be completed.

Sender tab

Where available, your sender data is shown as sent to the recipient.

11.3 Fax functions in other Windows applications

Faxing in the application

Installation of XPhone Unified Messaging adds an additional printer driver in the **Printers and Faxes** folder in the Windows Control Panel. This printer driver can be used in any Windows application even if the additional buttons are not present as in Microsoft Outlook and Word.

All Windows applications that support document printing access this folder.

- Open a file in any Windows application, e.g. a table in Microsoft Excel or a web page in Microsoft Internet Explorer.
- Go to **File -> Print**. This print dialog may vary slightly from application to application, but the basic functionality is always the same. Select **XPhone Fax** from the list of available printers.
- If necessary, make other settings such as paper format, resolution etc. For more information, see Fax options in other Windows applications. As a rule, you will not have to change anything.
- Click **Print**. The Outlook fax form opens; the **Preview** tab is activated. Proceed as described in the chapter Faxing with XPhone.

Faxing the file directly

Instead of faxing a file from an application, you can fax it directly from Windows Explorer.

- In Windows Explorer, navigate to the file you want to fax.
- Right-click the file. In the context menu select **Send to -> XPhone Fax**.

- c) The Outlook fax form opens; the **Preview** tab is activated. Proceed as described in the chapter Faxing with XPhone.

11.3.1 Fax options in other Windows applications

Define fax options for all Windows application in the Windows Control Panel. These settings can be overwritten with the settings in the individual Windows applications. The settings options in the Control Panel are the same as in the individual Windows applications.

- a) Right-click **XPhone Fax** in the **Printers and Faxes** folder in the Windows Control Panel to open the context menu.
- b) Select **Printing Preferences...** in the context menu.

If desired, before sending the fax you can edit your fax settings and define them individually for the document to be faxed (see step c) in Fax functions in other Windows applications). To do so, click **Settings** in the application print dialog. You have the following settings options in the **Print Preferences** dialog:

Layout / Resolution tab

Paper Format: Select a paper format from the list. As a rule, fax paper is the correct choice.

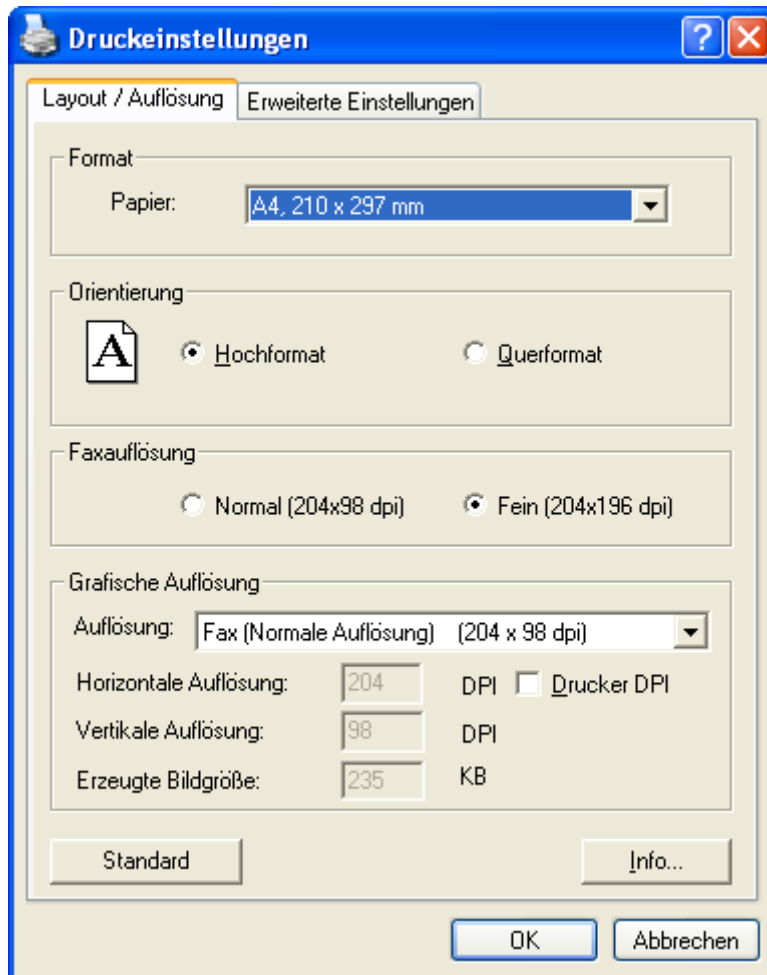
Orientation: Choose between portrait and landscape format.

Fax Resolution: Choose between normal and high.

Graphic Resolution: This setting determines the quality and size of the generated .tif file. Choose the highest possible resolution for graphics. Note, however, that the document is not faxed with these values but rather with those defined under **Fax resolution** (normal or high), so the resolution may be lowered again.

Printer DPI: Some applications (e.g. Microsoft Excel or Word) save the printer resolution in the document itself. The printer will then use those settings. If the option "Printer DPI" is activated, however, the system will use the settings from the printer driver, and not the settings in the document.

Default: This resets all settings to their defaults.

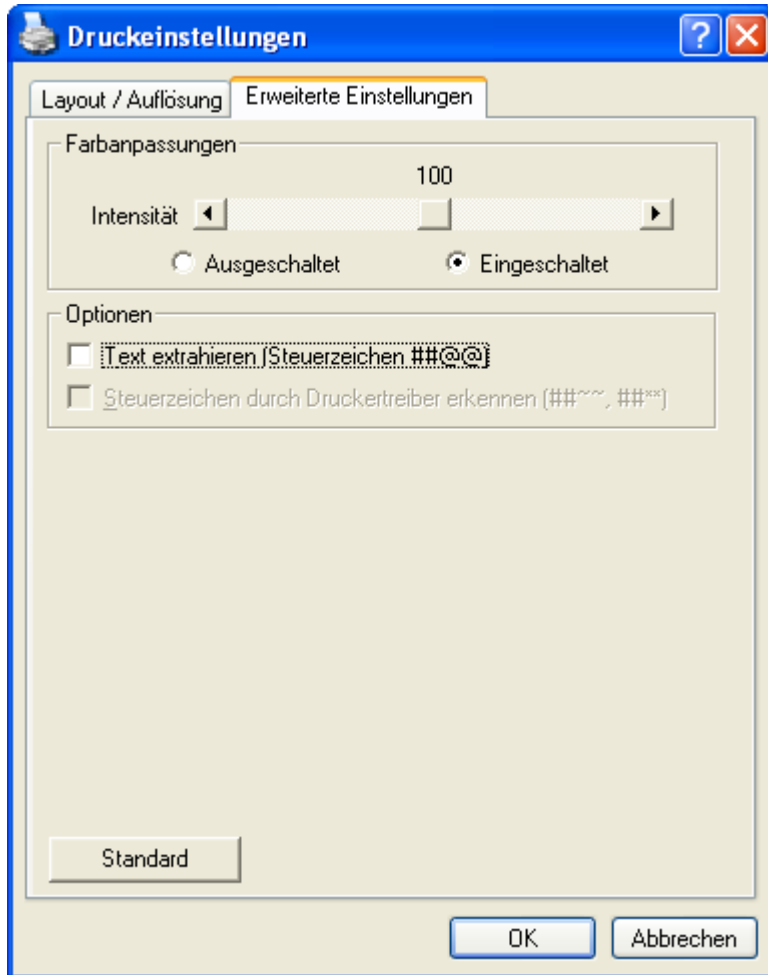


Advanced settings tab

Colour matching: Deactivate colour matching for black/white mode. The slider sets the threshold value defining when a colour value becomes white or black. Activate colour adjustment for grey level mode. The slider regulates the lightness of the grey levels. For a darker result, move up the slider.

Options: If you want to apply or suppress control characters in your fax document, activate or deactivate the options for the various control character types.

Default: This resets all settings to their defaults.



Note: The name of the XPhone fax printer is defined in the registry under

HKEY_LOCAL_MACHINE\SOFTWARE\C4B\Printers

. If you change its name in the Windows Control Panel, Windows applications can no longer access it.

11.3.2 Mixing e-mails, faxes and text messages

A message can be sent simultaneously as an e-mail, fax and text message. The restrictions that apply to faxes and text message services must be observed.

- a) Open a new e-mail form.
- b) Select the recipients in the various categories as described in the sections on Composing new faxes and Composing new text messages. The recipient list now contains e-mail, fax and text message recipients.
- c) Compose your message, adding any attachments.
 - ☐ E-mail recipients receive an e-mail with your message as e-mail text and any attachment in the original format.
 - ☐ Fax recipients receive a fax comprising the default fax cover sheet with your message (provided you have selected a fax cover sheet template, see section on Sending options see "Scheduling") and any attachment as an actual fax document.
 - ☐ Recipients of text messages will receive the first 160 characters of the message (incl. subject). Attachments cannot be transmitted. Your message may be interrupted mid-sentence.

11.4 Fax integration with outside applications

It is possible to operate XPhone UC Fax directly from the printing function of another application via an application interface. This is worth doing if you want order confirmations or delivery notes to be sent directly from an operational ERP system. XPhone UC Fax remains hidden from the user in this case. The XPhone UC Fax printer must be configured so that the document can be sent.

11.4.1 Using control characters to send faxes

Control characters are used to send the document created by the application; these control characters contain, for example, the fax number of the recipient. Control characters are similar to merge fields and can be embedded anywhere in the document. The preferred location for control characters is at the end of the document, where they cannot affect its formatting.

Note: In order for control characters to be processed, you have to make the required settings in the fax printer; go to **Options** in **Advanced settings** and set the necessary check marks.

Control characters have a specified syntax consisting of the following elements:

- Prefix
- Suffix
- Field contents

Recommended procedure

The field contents usually contain a variable from the controlling application. The syntax is structured as follows:

- Prefix: @@~~
- Field contents: XPSEL_Fax=<Fax number>
- Suffix: ~~

Example: @@~~XPSEL_Fax =08912345678~~

Note: We recommend this method as it ensures reliable transmission from other applications. To hide the control characters from the recipient on the sent document, you can create the control characters in white font, or store the information on a separate page added to the end of the document. If this is not possible, you can select one of the following alternatives. Please note that the methods described below may not work reliably unless control characters and field contents are transferred in a string (e.g. in the case of spaces, format changes etc.).

Alternative 1: Field contents are partially printed

In this case, the syntax is structured as follows:

- Prefix: ##**
- Field contents: XPSEL_Fax=<Fax number>
- Suffix: **

Example: ##**XPSEL_Fax =08912345678**

- Result: The prefix and suffix are removed, the fax document only shows: 08912345678. Please only use this method if you can ensure that the control character syntax does not contain format changes, line breaks or similar.

Alternative 2: Field contents are not printed

In this case, the syntax is structured as follows:

- Prefix: ##~~
- Field contents: XPSEL_Fax=<Fax number>
- Suffix: ~~

Example: ## ~~XPSEL_Fax =08912345678~~

Result: The prefix, suffix and field contents were removed completely and do not appear in the document. Please only use this method if you can ensure that the control character syntax does not contain format changes, line breaks or similar.

Insert additional field names

Fields other than the mandatory fax number of the recipient can be transmitted to XPhone UC Fax by means of control characters. They include the recipient's name, company and department. This information is included in the cover page.

See the annex for a list of available field names.

Sending faxes with subjects from third-party applications

To add a subject to the document, the document must contain a control character with the following field contents:

subject=<Subject>

Example: @@~~subject=Invoice No. 1234~~

Note: The subject is also entered and displayed in the journal.

Hiding/showing the fax dialog

Fax transmission will begin immediately without user intervention, provided the document contains a fax number and a control character with the following field contents:

mode=silent

Example: @@~~mode=silent~~

To display the fax prior to transmission, the document should contain a control character with the following field contents. This is the default setting if no mode is specified.

mode=interactive

Example: @@~~mode=interactive~~

11.4.2 Example of a fax with control characters

Hint: Control characters are best placed at the end of the document.

This example uses the following control characters:

Name	Meaning
subject	Subject line
xpsel_fax	Recipient's fax number
xpdb_name	Recipient's last name

xpdb_vorname	Recipient's first name
xpsnd_lastname	Sender's last name
xpsnd_firstname	Sender's first name

Other possible control characters:

Name	Meaning
mode	Fax controller for automatic fax transmission Value: silent interactive
SendDateTime=Immediate	Immediate transmission (default)
SendDateTime=Retain	Fax is retained in outbox until sent manually
SendDateTime=LowCost	Transmission at economy rate configured on the server
SendDateTime=20100808153000	Transmission on a certain date + time (YYYYMMDDhhmmss)
SendDateTime=172000	Transmission at a certain time on current day (hhmmss)

##~~subject=Test Steuerzeichen~~

##~~xpsel_fax=12345~~

##~~xpdb_name=Walker~~

##~~xpdb_vorname=Werner~~

##~~xpsnd_lastname=Huber~~

##~~xpsnd_firstname=Otto~~

##~~mode=interactive~~

11.5 XPhone UC SMS


11.5.1 Composing new text messages

You can compose a new text message via **File -> New text message** in XPhone UC Commander.

The text message dialogue serves towards generating a text message. It is broken down as follows:

- Recipient selection (top)
- Message and sending options (bottom)

Selecting the recipient


Specify the recipient of a text message using the entry field for contact data (top). The data can be entered manually or imported from the address book via the **To...**  button.

Do this by entering the name or mobile number in the search field and clicking **Start search**. A list of the

contacts found appears. Click the mobile number or select the contact and click the **Text message** button to import the contact to the text message dialogue.

A recipient must have at least a text message number; all other fields are optional.

An additional recipient number can be entered directly without any blanks or searched for and imported via **To....**

Recipients can be removed from the list of recipients via **"X"** .

Message

Enter the message to be sent. The number of remaining characters is shown at the bottom of the entry field.

11.5.2 Text message options

Sending options

Specify the following here:

- When the message is to be sent (As soon as possible, Leave in the outbox, Time).

Sender

Your sender information is listed here as received by the recipient. You can change or remove your mobile number.

Other settings

Via XPhone UC settings, you can make additional setting such as confirmation messages by e-mail.

11.6 XPhone UC Voicemail

XPhone UC is a very powerful service. During your absence, it allows

- you to play a message for your callers
- your callers to leave you a message
- your callers to be connected to your representative
- you to listen to, control and configure your voicemail box from any telephone
- you to obtain an overview of e-mails in your inbox from any telephone by
 - ☐ having your e-mails read aloud via Text-to-Speech enabling you to react
 - ☐ you to have an e-mail overview faxed to you.

If you are out of the office, you can configure your phone in such a way that all incoming calls are forwarded to the voicemail dial-in number. Your administrator will provide you with this number. Setting up the forwarding function automatically activates the voicemail functions. Inbound calls no longer make your phone ring; instead, they are routed directly to the voicemail box. Depending on how you set up your voicemail box (see "XPhone UC UM settings"), callers will hear a system text or a personal greeting, can leave a message or be connected to your representative etc. You can then check your voicemail box and e-mail inbox remotely.

11.6.1 Remote access

Remote access enables you to perform a number of functions and is possible from any telephone connection. To use this function you require a touch tone telephone to enter your PIN or to navigate through the menu.

There are various ways of initiating remote access.

Calling the voicemail dial-in number

Your administrator will provide you with the voicemail dial-in number. This is the same number you forward calls to when you activate your voicemail box.

- Dial the voicemail dial-in number from any telephone.
- When prompted to enter your extension, enter it using the telephone keypad and conclude your entry with the pound key >>#>>.
- When prompted to enter your PIN, enter it using the telephone keypad and conclude your entry with the pound key >>#>>. This is the PIN you defined in the menu **Change voicemail PIN** in the XPhone UM settings (see Changing voicemail PINs see "Voicemail settings").
- XPhone UM Voicemail now tells you whether you have any new voicemails and plays them back for you.

If you call the voicemail dial-in number from your work phone, the system recognises you and you go directly to the voicemail menu without entering your PIN. If you have activated the option **Always request PIN entry** in the Voicemail menu in the XPhone UM settings (see Voicemail see "Voicemail greetings"), you will be asked for your PIN even if you are calling from your extension. This option improves security and can be activated if desired.

Calling your extension

Instead of the voicemail dial-in number, you can also call your extension directly. First, though, you have to activate call forwarding from your extension to the voicemail dial-in number and ensure that calls are not forwarded to anyone else at your company.

- Dial your extension number from any telephone.
- Wait until you hear your personal greeting.
- You can press the star key <<*>> to interrupt the greeting while in progress.
- When prompted to enter your PIN, enter it using the telephone keypad and conclude your entry with the pound key >>#>>.
- XPhone UM Voicemail now tells you whether you have any new voicemails and plays them back for you.

Calling from a direct extension number

You can specify a direct extension number in the Voicemail menu in the XPhone UM settings (see Voicemail see "Voicemail greetings"). When you call the voicemail dial-in number (see above) from this telephone number (e.g. your mobile phone or your current number at a hotel), you go directly to your voicemail box without being asked for your PIN.

To do this, you have to be calling from a phone that presents its caller ID. Otherwise, you cannot be identified and will be asked for your extension and PIN.

If you have activated the option **Always request PIN entry** in the Voicemail menu in the XPhone UM settings (see Voicemail see "Voicemail greetings"), you will be asked for your PIN even if you are calling from your direct extension number. This option improves security and can be activated if desired.

11.6.2 Remote access functions

If you have set up remote access to your voicemail box, you can do more than just listen to inbound voicemails. You can choose from a variety of functions depending on the rights you are granted by your administrator. The system can go through each menu item and explain its functions, actions and which

keys activate them. Press the <<0>> key to get help at any time and repeat all your options.

11.6.2.1 Voicemail menu

Directly after dialling in to your voicemail box, you will find yourself in the main menu. The following options are available here:

Managing your greetings (Greetings menu item)

Check which one of your greetings is active and change it if you wish. You can select one of your greetings configured in the Voicemail menu in XPhone UC Settings (see section on Voicemail see "Voicemail greetings") or create a new greeting. What's more, you can record your name and activate or deactivate special greetings depending on the settings made by your administrator.

Listening to voicemails (Voicemails menu item)

You can listen to your new and archived voicemails. Additional options may also be available such as [Read caller number aloud \(5\)](#), [Return call immediately\(6\)](#) or [Delete message \(9\)](#).

Settings

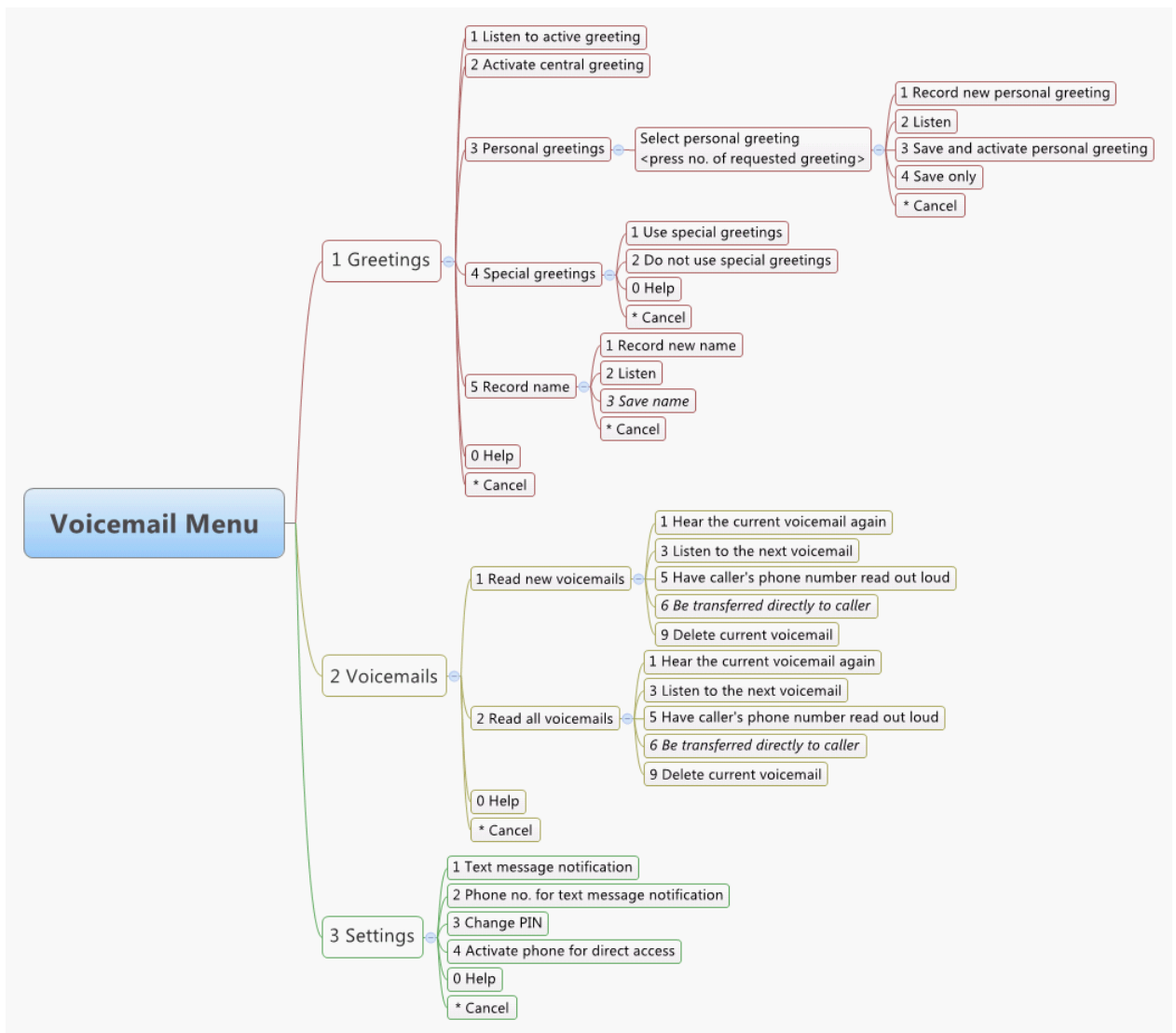
If XPhone UC Settings is not yet set up in the Voicemail menu, you can activate or deactivate (1) text message notification of incoming voicemails here and change the number for text message notification (2). You can also change the PIN specified in the XPhone UC Settings Voicemail menu for remote access to the voicemail box (3) or enable your telephone for direct access if you have not already configured this setting via XPhone UC Settings (4).

Listening to e-mails (E-mails menu item, not always available) (requires Text-to-Speech)

You can have the e-mails in your Microsoft Outlook outbox read aloud. You can choose whether you wish to only have newly received e-mails read aloud or all of the e-mails in your inbox. You may have other options available such as deleting e-mails or forwarding by fax etc.

You can also reply to e-mails by dictating your message to your voicemail box. Your reply is recorded as a wave file (.wav) and sent to the original sender as an e-mail with an attachment.

Note: The system can only access e-mails in the Microsoft Outlook inbox. If you have a rule that distributes inbound e-mails to different folders, those e-mails cannot be retrieved remotely.



12 Collaboration

XPhone UC Commander offers the possibility of Web collaboration, i.e. collaboration by several people via "screen sharing". A distinction is made between free screen sharing which is purely internal (see Internal screen sharing) and FastViewer Instant Meeting (see FastViewer Instant Meeting).

12.1 Internal screen sharing

XPhone UC Commander includes free screen sharing functions for in-company (1-1) usage. The function is automatically available and without additional licenses for XPhone UC Office users as of Windows Vista.

12.1.1 Features of internal screen sharing

- Start Web conference via **Instant Messaging** or request screen sharing
- Set up session without entering session numbers
- In-company 1-1 use (for XPhone UC users)

12.1.2 Starting sessions for internal screen sharing

Internal screen sharing can be started "spontaneously" by **Instant Message (IM)** in that just one internal contact is selected, **Actions**/Context menu (right-click) opened and either "Share my screen" or "Request screen sharing" is selected. The instant message window opens for both participants and the session invitation (yellow bar) is shown. The session can only be set up once the participant has clicked the **Accept** button.

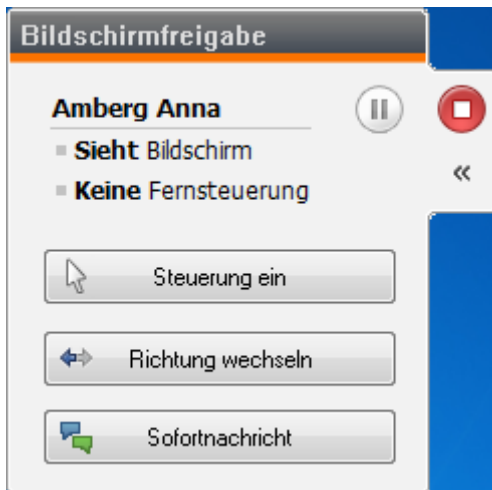
12.1.3 Licensing and activating internal screen sharing

No special license is required for internal screen sharing. Screen sharing is available for XPhone UC Office users as of Windows Vista.








In order to activate the screen sharing function, the user must be assigned the **Collaboration template** (see Server Manual) with authorisation for "Integrated screen sharing and remote control in the Intranet". This enables the user to invite to and participate in screen sharing or even remote control other users.

12.1.4 Internal screen sharing function

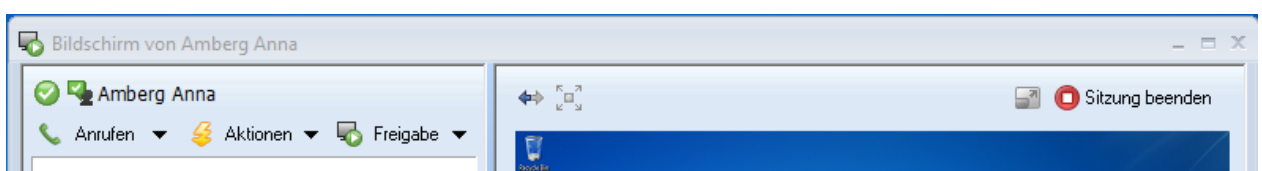
After selecting one internal contact and opening **Actions/Context** menu (right-click) -> **Share my screen...** or **Request screen sharing...**, the **Instant Message (IM)** window opens for both participants. To start the session, the invited participant must click "Accept" in the yellow area. The session panel opens for the participant who shares his screen:








Then the following information/functions is/are visible:

- the name of the participant who can see the shared screen
- if several screens are linked, the screen which is currently visible
- whether the other participant has remote control over the shared screen
- "Pause"  The shared screen goes black for the other participant and a "pause symbol" is displayed until the session is resumed ("Play" button )
- "Stop"  to end screen sharing
-  to fold or  expand the session panel
- "Activate control" to allow the other participant remote control over the shared screen (status message at top changes to "Active remote control")
"Deactivate control" to withdraw remote control by the participant over the shared screen. This is also possible via the Alt+Pause hotkey combination.
- "Change direction"  initiates a change in direction of the shared screen. The panel closes; the other participant must confirm the change in direction by clicking "Accept" in the IM window in the yellow area.
- "Instant message"  causes the **IM window** to appear in the foreground.

As a viewer, expansion of the **IM window** is shown with the following information/functions:



- "Screen from" name of the participant who has shared his screen
- Presence status, **Instant Message** status and name of participant who has shared his screen

- "Call" lists all of the phone numbers available for calling the participant
- "Actions" offers all of the possible functions such as "Send e-mail" or "Send text message" (see **Actions** under **Favourites** or **Contacts**).
- "Screen sharing" opens the menu for internal screen sharing
- "Change direction"  initiates a change in (viewing) direction of the shared screen. Expansion of the **IM window** closes, the other participant must confirm the change in direction by clicking "Accept" in the yellow area in the **IM window**.
- "Original size"  expands the screen shown to the original size within the screen sharing window. The screen section can be shifted using the scroll bar.
- "Full page view"  expands the screen sharing window to the viewer's full page.
 "End full page view"  reduces the screen sharing window to the previous size of the **IM window** with screen sharing expansion.
- "End session"  ends screen sharing.

12.2 FastViewer Instant Meeting

FastViewer is designed for use inside and outside the company. C4B offers an interface for integrating FastViewer (Modul fastcom.exe) in XPhone UC Commander.

Note: The documentation scope of FastViewer Instant Meeting outlined in the XPhone UC Commander manual is restricted to an introduction to a FastViewer session (screen sharing). For general usage of FastViewer Instant Meeting, please refer to the FastViewer manual: http://portal.fastviewer.com/documents/de/docs/Handbuch_v31.pdf.

Please note that C4B does not offer any support in the usage or administration of FastViewer Instant Meeting.

12.2.1 FastViewer Instant Meeting features

- Start a Web conference via **Instant Messaging** or request screen sharing
- Set up session without entering session numbers
- Set up Web conference with several persons from XPhone UC Commander (ad hoc)
- Send invitations to external contacts by e-mail from XPhone UC Commander
- Invite participants to a current FastViewer session from XPhone UC Commander
- Use of the central or in-company FastViewer server

12.2.2 Starting sessions for FastViewer Instant Meeting

A spontaneous session can be started for "internal" users via **Instant Message (IM)** by selecting one or more internal contacts (max. ten for screen sharing), opening **Actions/Context** menu (right-click contact) and selecting "Session invitation to ... (IM)" or "Remote control rights from ... (IM)" via "FastViewer Instant Meeting".> (FastViewer remote control is only possible when just one contact has been selected.) The instant message window opens on both sides and the session invitation (yellow bar) is shown. To enable a session to be set up, the participant must **Accept** the invitation in the IM window.

Another possibility for starting spontaneous sessions is to send invitations by e-mail in which one or several contacts are highlighted (max. 100 contacts for screen sharing, incl. external users), open **Actions/Context** menu (right-click contact) and via "FastViewer Instant Meeting",> select "Send session invitation (e-mail)" or "Request remote control rights (e-mail)" for just one contact. The e-mail with the template text, the contact's e-mail address and the invitation (left) open and need to be sent manually (press the "Send" button in the e-mail form) and possibly individualised.

A session can also be planned in advance with a FastViewer license (see [Collaboration template](#) in the Server Manual) by right-clicking a contact in the context menu and opening the [Conference planner](#) in [FastViewer Instant Meeting](#). **NB:** A planned session does not mean that a license is also reserved for the planned time. There can be overlaps as the conference planner also has a license. For an exact description of the [Conference planner](#), please refer to the FastViewer manual under http://portal.fastviewer.com/documents/de/docs/Handbuch_v31.pdf.

TIP: If you have linked the Virtual Directory (VDir) as the address book in Outlook, you can insert all of the VDir contacts you need in the session invitation e-mail opened in the [Conference planner](#).

Participants can also be invited to an existing session at a later stage. This can be done by either selecting the participants in XPhone UC Commander, [Actions](#)/Context menu (right-click contact) -> FastViewer Instant Meeting -> "Invite 'xxx' to screen sharing session 12345 (IM)" or "Invite 'xxx' to screen sharing session 12345 (e-mail)", or you can use the FastViewer session panel and invite the participant(s) by e-mail via the "Invite" button.

To avoid overlaps by FastViewer sessions (owing to multiple licenses), a reminder function is available which reminds you to end open sessions after a certain period of time.

A detailed description of all FastViewer Instant Meeting functions is available in the FastViewer Manual http://portal.fastviewer.com/documents/de/docs/Handbuch_v31.pdf.

12.2.3 Licensing and activating FastViewer Instant Meeting

FastViewer Instant Meeting is available for XPhone UC Office users as of Windows XP.

In order to activate the FastViewer Instant Meeting functions, the user must be assigned the [Collaboration template](#) with authorisation to "Link to the Web conference solution FastViewer Instant Meeting". This enables the user to invite to or participate in FastViewer Instant Meeting or remotely control other users.

Full functional scope of FastViewer Instant Meeting requires a special "Instant Meeting" license from FastViewer or OpenScope.

Note: Fastviewer or OpenScope licenses can be procured from the respective partner and are not distributed or supported by C4B.

12.2.3.1 Fastviewer demo mode

Without a license, FastViewer Instant Meeting (screen sharing) can be used with full functions but limited to a period of five minutes.

Please note that a session can however only be planned with a valid license ([Conference planner](#)).

12.2.3.2 Licensed Fastviewer mode

In licensed mode, the full functions of FastViewer Instant Meeting (screen sharing) can be used without any time restrictions incl. [Conference planner](#).

12.2.3.3 Licenses and features

Integration is only possible with the "Instant Meeting license" from FastViewer or OpenScape. Information on the features offered by FastViewer is provided at www.fastviewer.de.

12.2.4 Testing FastViewer Instant Meeting

In XPhone UC Commander, a "test tool" is provided under **Start -> All programmes -> XPhone UC -> Tools -> Logging & Tools -> Tools -> <Test> X0FV**. This enables you to find out what authorisations you have for FastViewer Instant Meeting (e.g. host session or participate only), what license is used and whether the system requirements check was successful or errors arose during testing (e.g. network or Internet connection interrupted).

13 XPhone UC Settings

You can define the basic behaviour of the various Unified Messaging services in the XPhone UC settings web interface. Some of these settings can later be overwritten on a case-by-case basis for individual faxes or text messages. Call up the UC settings in your e-mail client via [Settings for XPhone UC](#) or in XPhone UC Commander via [File -> UM settings](#).

At various points, you will be requested to enter phone numbers in entry fields. The following telephone number formats are supported:

089123456	089 123456
(089)123456	(089) 123456
089-123456	089 - 123456
089/123456	089 / 123456
004989123456	0049 89 123456
+4989123456	+49 89 123456
+49(89)123456	+49 (89) 123456
170 (where internal telephone number length = 3)	

etc.

You must always enter the complete area code with a leading zero (e.g. 089 for Munich). If a country code is provided, it must be preceded by + or 00 (e.g. +49 or 0049 for Germany). The country code, area code and telephone number can be separated by characters and spaces; there are no restrictions on their type or number. Internal company extensions are recognised as such if they correspond to the length of internal phone number defined in XPhone UC Server under [Settings -> CTI -> Dialling parameters -> Properties](#) (e.g. 170, where length of internal phone number = 3).

13.1 Call forwarding

This menu is only available if you use Unified Messaging in conjunction with XPhone UC Commander and an active telephone line is assigned to you. Like the CTI client, this feature enables you to distinguish between internal and external inbound calls and to forward them to other numbers or to your voicemail box. Click [Set call forwarding](#) to save your settings.

13.2 Voicemail greetings

Greeting text

Select the greeting for your callers in your absence. You can choose between one or more centralised greetings and (depending on the configuration by your administrator) several personal greetings designed by you.

Via the [Playback](#) button, you can listen to the respective greeting. Click [Edit](#) to change the greeting.

The greeting text appears in the bubble below once it has been entered accordingly. If your name is used in a greeting, you can record it (again) via the [Edit](#) button.

Special greetings

Special greetings can be provided by the administrator in order to avail of company-wide greetings for particular occasions such as bank holidays or company holidays, for example. Once they are activated, they temporarily replace the greeting activated by you.

To activate or deactivate special greetings, set or remove the checkmark at **Special greetings can temporarily replace your own greeting**. The administrator can also however restrict this configuration option.

Click **Save** to import the changes.

13.3 Voicemail settings

E-mail forwarding

If you wish to send copies of your voicemails to an e-mail address, select whether they are to be sent to your e-mail address or another address. It is possible that your administrator offers a restricted version of this configuration.

Text message notification

Activate the option **Text message alert when a voicemail message is received** if you want to be notified by text message of incoming voicemails.

Additionally, activate the option **Even if no new voicemail message was left** if you want to receive a text message every time you miss a call, even if the caller did not leave a message. If this option is deactivated, you will only receive a text message if the caller left a message.

It is possible that your administrator offers a restricted version of this configuration.

E-mail notification

Activate the option **E-mail alert when new voicemail is received (without voicemail attachment)** if you want to receive notification by e-mail as soon as a new voicemail is received.

Additionally, activate the option **Even if no voicemail message was left** if you want to receive an e-mail even if the caller did not leave a message.

It is possible that your administrator offers a restricted version of this configuration.

Remote access

Activate the option **Allow remote access** if you want to listen to and configure your voicemail box from any telephone. Most of the options that can be configured in the XPhone UC settings can also be edited remotely. If this option is deactivated, you can no longer access and configure your voicemail box by telephone.

Specify which telephone number is to be used as your direct access number. When you call the voicemail dial-in number from this telephone number, you go directly to your voicemail box without being asked for your PIN. The default setting is the mobile phone number listed in your contact data. You can also specify any other number for this setting (e.g. your current number at a hotel). To do this, you have to be calling from a phone that presents its caller ID. If caller ID is deactivated on the phone, you will be asked for your PIN just like when calling from any other connection.

Activate the option **Always request PIN entry** if for safety reasons you always want to be asked for your PIN when calling your voicemail box, even when calling from a direct access number.

Change voicemail PIN

Use the **Change PIN** button to change the PIN you use for remote access to your voicemail box. First enter the old PIN, then enter the new one twice.

13.4 Fax

Set the basic settings for faxing in the **Fax** menu item. Some of these settings can be overwritten on an individual basis for each fax when it is created. See Fax options for more information.

Header: This is where you can define a default header that appears on all faxes. It is written at upper left in the small line that also contains the sender ID.



You can write in a text or specify variables in this field. If you use variables in the header, the variables will be replaced by the user data stored in the XPhone server when the fax is sent out. The system uses the following placeholders:

- <<name>> is replaced by the value in the 'Last name' field
- <<firstname>> is replaced by the value in the 'First name' field
- <<company>> is replaced by the value in the 'Company' field
- <<custom1>> is replaced by the value in the 'Custom1' field
- <<custom2>> is replaced by the value in the 'Custom2' field
- <<custom3>> is replaced by the value in the 'Custom3' field
- <<custom4>> is replaced by the value in the 'Custom4' field

It is also possible to combine text and variables (e.g. "Fax from <<last name>>").

Text message notification: Activate **Delivery notification as text message** if you want to be notified of inbound faxes by text message. Please note that activating this option may incur added costs for your company.

If desired, you can arrange to receive a confirmation e-mail by activating one or more options under **E-mail confirmation**. This confirms that the data was received by the remote device. You can change these settings individually whenever you create a fax.

- **Confirm if sending was successful**
- **Confirm if sending failed**
- **Attach fax copy to confirmation message**

Cover page: Here you can define a **Default cover page** that is attached to every fax. You can change this cover page individually whenever you create a fax.

13.5 Text message

Set the basic settings for using text message functions in the **Text message** menu item. Some of these

settings can be overwritten individually whenever you create a text message. See Text message options.

Phone numbers

- Under **Sender phone number** you decide which number should be displayed as the sender number to people who receive your text messages. If you select **Mobile phone number master data**, the system will present the mobile number in your contact data to the recipient. The system will always present the latest number, even if it is changed in your contact details. Alternatively you can enter any other sender number.
- Under **Notification phone number** you set the number where you want to receive text message notifications.

If desired, you can arrange to receive a confirmation e-mail by activating one or more options under **E-mail confirmation**. You can change these settings individually whenever you create a text message.

- **Confirm if sending was successful**
- **Confirm if sending failed**

This confirms that the text message provider has received the text message. It does not confirm that the provider has also forwarded it to the recipient. This confirmation e-mail cannot be considered a delivery confirmation.

13.6 Mailbox

This is where you provide the Unified Messaging services with the password for your e-mail inbox (Microsoft Exchange, IMAP, Notes Domino etc.). This is the password used by your e-mail client (e.g. Microsoft Outlook) to call up your e-mails. It is generally your Windows password. Your current mailbox password must be stored here in order for the Unified Messaging services to access your mailbox, for instance to retrieve voicemails, etc. Each time your mailbox password is changed (due to company policies, etc.), you must also change the password here. Enter the new password twice and click **Save**.

13.7 Changing passwords

Here you can change the password that you use to access your XPhone UM settings. First enter the old password, then the new one twice.

13.8 Language

Edit the language of the XPhone UC Settings interface. Select a language from the list and click **Save**. The change is immediately visible.

13.9 Logging off

When you log off the XPhone UM settings interface, you are asked whether you want to close the browser window. For security reasons, we recommend closing the window so no other users can see your data. But you can also leave the browser window open if you want to visit another website.

14 XPhone – Mobile Control

14.1 Mobile line in XPhone UC Commander

The XPhone UC Commander can use your mobile line just like any other office landline provided that you have been configured as a user for Mobile Control by your administrator and have the corresponding license. You can dial using the call manager, prepare calls, search for contacts in linked address books and utilize convenient CTI features such as Hold, Swap hold and Conference calls if your mobile phone provider supports these functions.

To ensure that the mobile line is activated in XPhone UC Commander, the Mobile Control software must be installed on your mobile phone and connected to XPhone UC Server.

To safely link the mobile device with XPhone UC Server, the device must be registered with the server upon initial start-up.

More information on settings is also provided in the section on Settings for telephony.

14.2 Mobile client start-up

Start-up only requires installation of the client software on the mobile device and once-off registration with your XPhone UC Server.

During start-up, your administrator unlocks the Mobile Control function for you on the XPhone UC Server.

If the administrator has not selected any other method of client installation (e.g. deployment via Blackberry® Enterprise Server), you will receive a text message with a download link for the client software. After downloading, installation and starting the software, it is ready for registration with your XPhone UC Server.

This requires:

- a transaction code
- your XPhone UC login password

Your transaction code is provided via an e-mail automatically generated from your XPhone UC Server.

After entering the registration data followed by successful registration, the client asks whether you wish to be connected to the XPhone UC Server. In this case, the login password must be entered again. This password is saved in coded form on the device to prevent login without any additional entries. Enter twice to prevent an incorrect password from being saved.

14.3 Mobile Client settings

After installation, the program is stored in your mobile phone's installation directory and is ready for use following registration.

If the XPhone Mobile Control application is opened, the following configuration entries are visible:

Control element	Status	Description
Current status	Connected	Connection with the XPhone UC Server, Mobile Control possible via the Commander
	Connected – Schedule	Connection with the XPhone UC Server set up on the basis of schedule settings
	Disconnected	No connection to XPhone UC Server.
	Disconnected, Schedule	No connection to XPhone UC Server as current time is not within the defined schedule
	Disconnected, Battery	Disconnected as the battery level has fallen below the defined level. As soon as the mobile is recharged, an automatic attempt is made to set up a new connection
	Disconnected, Error	Disconnected following an error, usually network problems (no UMTS or WLAN reception) or the XPhone UC Server is not available
Server connection	On	The connection remains active until you disconnect it or the battery level is too low
	Off	No connection is set up
	Schedule	Depending on the time defined in the schedule, the connection starts and ends automatically
	<Your current access point>	Here you can select the access point via which you wish to set up the connection to the XPhone UC Server
Remote telephony control	Off	The XPhone UC Commander cannot dial via the mobile line
	On, Silent	The XPhone UC Commander can be used to dial the mobile line but the mobile end device does not emit any control signal
	On, Play sound	The XPhone UC Commander can be dialled via the mobile line. For security reasons, a control signal is emitted from the end device before the dialling process is started

In the Options menu, the following functions are available:

Display log

This option is intended for the Support department. You can copy the contents of the log file into the clipboard to send the content to your administrator by text message or e-mail.

Info

The software version number is shown here.

Settings

Use the Settings menu to make various changes to the configuration – these are described in more detail below.

Close

This closes the window and returns to the previous menu item. This does not result in disconnection.

XPhone Mobile Control – Settings menu

Connections

The connection settings contain information on UMTS host & port and WLAN host & port, and are specified by the administrator. They should only be changed in co-ordination with the administrator.

Schedule

You can define the schedule when XPhone Mobile Control is to be automatically started and ended. Enter the start and end times here as well as the weekdays on which XPhone Mobile Control is to be started. Save your changes.

Options

You can edit the following settings:

- **Language** – Choose between German and English
- **Stop on battery level** – As soon as the battery level falls below the value defined here, the connection is ended.
- **Connection on start-up** – Define what XPhone Mobile Control should do when the mobile end device is switched on. The options available are On, Off, Schedule.
- **Send location to server** – Activates or deactivates transmission of the mobile phone cell function. Currently not used.
- **Protocol level** – Configure the logging level. This setting is intended for product support.

Password

The password saved on the device can be changed here. This setting does not change the login password for the XPhone UC Server.

Server registration

This function enables you to renew your server registration. This is necessary when the device is transferred to another person, for example.

Reset

Resets all settings to the default specified by the administrator. This does not have any influence on server registration.

15 Combining CTI with other applications

15.1 Dialling via URL log handler

External applications can utilise the XPhone UC Commander dialling function if notation via URLs is used for dialling.

The Commander implements the following URL handlers:

tel: – The number is dialled when the URL is executed.

phone: – The number is imported to the Commander call manager.

A web application dials by clicking the following hyperlink, for example:

```
<a href="tel:0049891234567">0049891234567</a>
```

15.2 XPRun

XpRun serves as an interface between the XPhone Client and other applications. Numerous XPhone features can be accessed from individual applications.

XpRun is registered as protocol handler (see `mailto:` on automatically calling the default e-mail client).

XpRun is installed with XPhone UC by default.

The feature to be executed is called and communicated to XpRun via the command line interface as a parameter.

XpRun calls are all performed from the Execute window for tracking reasons. But calls can also be made from a html page, for example.

15.2.1 Registering / Deregistering

XpRun needs to be registered to ensure that it can be called from other applications. As XpRun is a component of the XPhone UC client setup, it is automatically registered during setup.

If however manual registration is necessary, XpRun must be called using the `-Register` parameter. The default location of XpRun is `C:\Programme files (x86)\Common files\C4B\AppBridge`. In this case, the call is:

```
C:\Programme files (x86)\Common files\C4B\AppBridge\XpRun.exe -Register
```

If deregistration would appear to be necessary, you can use the `-Unregister` parameter to do so.

15.2.2 Info dialogue

Call XpRun without parameters to obtain an overview of the call convention:

```
xprun:
```

15.2.3 Making calls

Transferring a phone number as a parameter triggers direct dialling of the phone number indicated.

```
xprun: +49(89)840798 160
```

The phone number is dialled immediately. The country code does not necessarily have to be indicated along with the phone number; when calling an extension (e.g. 160), indicating this number is sufficient.

15.2.4 Compact view

If you wish to open XPhone UC Commander in the compact view, a verb with the allocated phone value must be transferred to XpRun. If the compact view is to be filled with contacts, the data field (e.g. name) and its value (e.g. walker) can be transferred as additional parameters.

```
xprun:verb=phone;name=walker
```

This means that XPhone searches for all contacts called "walker" and then shows them in the compact view.

15.2.5 Call manager

The call manager is called via the action verb. Just like calling the compact view, optional search parameters (e.g. search for contacts called "walker") can be indicated.

```
xprun:verb=action;name=walker
```

15.2.6 Forwarding another protocol handler's call to XpRun

If when calling another protocol handler, the call is to be forwarded to XpRun, this forwarding can be performed using the "-Register <Name_of_protocol_handler>" command. If, for example, when calling mailto instead of the default e-mail client XpRun is called, the following call should be performed:

```
xprun: -register mailto
```

Finally, when calling mailto:0898407980, the participant whose phone number is 0898407980 is called instead of a new e-mail.

Undo this change using the following command:

```
xprun: -unregister mailto
```

15.3 Rules engine

XPhone UC enables you to create self-defined actions which are implemented by mouse click and/or assign rules to telephone events. If such an event (e.g. a call from a specified phone number) occurs, the application checks for suitable rules and carries out the action assigned to the event.

Note:

Sample rules are already available after installation but they are deactivated. You can activate these or even adapt them as required.

Rules comprise three elements: Time, condition and action.

Time

Show as action in menu

- a) First enter a text for the menu entry.
- b) Go to **Advanced** to define the position and, if necessary, the graphic for the entry. The menu entry can be displayed at the following positions:
 - ☐ Calls, Contacts, Call manager
 - ☐ Call manager
 - ☐ Calls
 - ☐ Contacts
 - ☐ Main screen ->Tools
- c) Use the Load button to allocate a graphic provided that it complies with the following conditions
 - ☐ Size: 16x16px
 - ☐ Format: png, 24 Bit

Execute automatically when

Select an entry from the drop down list for the time at which the rule is to be executed. For inbound calls, for example, this can be as soon as the phone rings (Inbound: Start ringing) or as soon as the XPhone programme starts.

Condition

- a) Specify whether the action/rule is to be executed **always** or only **when** certain conditions prevail.
- b) If the action/rule is only to be active under certain conditions, use Define to configure when this is the case (e.g. when a certain company calls).
- c) If the conditions are to be encapsulated, please activate the **Advanced** check mark.

Action

The following commands can be linked with telephone events:

- Execute a URL
- Execute a programme
- Execute a script (VBS)
- Copy into the clipboard
- Send an e-mail
- Send a DDE command
- Test output
- Play sound
- Execute a server command.

Depending on the command selected, you may need to enter various additional parameters.

Tip: If you create a test output menu item, for example, all of the parameters for the selected journal entry will be displayed with their corresponding values.

15.4 Hotkey features

Triggering telephony functions using hotkeys

XPhone UC Commander enables you to use telephony functions from almost all Windows applications directly without calling the telephony application. For this purpose, you can create hotkeys that trigger events. This is especially useful if you are working in another application and wish to dial a number in that application, or if, for some reason, you do not wish to show the XPhone UC Commander window while you are working in the other application. The following functions can be triggered using hotkeys:

- **Dial:** Select a phone number in another application, e.g. Microsoft Excel or an internet page, and then press the hotkeys for **Dial** to begin dialling. It does not matter if the phone number contains special characters such as spaces or brackets.
- **Accept:** You can accept calls by pressing the corresponding hotkeys
- **Disconnect:** You can use hotkeys to disconnect calls.
- **Start contact search:** If you wish to determine whether a contact is already stored in your address books, select the name and press the corresponding hotkeys to search all databases connected to XPhone UC Commander for this contact.

Changing views using hotkeys

XPhone UC Commander offers two views: Fullscreen view and compact view. You can use hotkeys to

switch between these two views, or to show one of the views (see Operation).

Defining hotkeys

You can define the hotkeys, if any, you wish to use.

- a) Open **Tools-> Options**.
- b) Open **System hotkeys**.

Here you can define

- the hotkey functions you wish to use
- the hotkeys you wish to use The default combinations are ALT + F12 for telephony functions and F11 / Shift + F11 for the views. To define a new combination, proceed as follows:

- a) Click the corresponding entry field.
- b) Now press the buttons you wish to define as the hotkey.

You can use **Hand off hotkey to application** to specify whether Windows or XPhone UC Commander should manage the hotkeys you defined:

- **Disabled (default):** The configured hotkeys are managed by Windows. If an XPhone UC Commander hotkey is detected, the operating system sends a message to the CTI application. The other applications are not informed when these hotkeys are used. This is the preferred method. In some system environments, this method is blocked, e.g. by anti-virus programs.
- **Enabled:** XPhone UC Commander monitors all key activities and reacts to the defined hotkeys. The active application receives messages regarding the keys you pressed. Only activate this option if the default method is unreliable in your environment.

16 CTI messaging wizard

16.1 Function of the messaging wizard

The abilities of XPhone UC Commander consist of far more than telephone support. You can use the integrated messaging functions to make your work processes noticeably more efficient, and to create e-mails, faxes, letters, order confirmations and so on directly from a call, or from an entry in a journal or address book. You access your templates directly, whether they are saved locally or centrally. XPhone UC Commander is connected to existing data bases and uses field functions to enter the required contact data automatically, including the salutation and your sender information.

You can link up to 30 templates each for e-mails, faxes, letters. You can save additional template files and transfer them to the selection list if required.

XPhone UC Commander installs template files into the Windows application data directory for all users. In Windows XP, standard users are only assigned read permissions. Only the main users and administrators have write permissions. This means that standard users are unable to change templates. There are two ways of enabling standard users to modify templates:

- The administrator changes the user permissions for standard users for the XPhone UC Commander directory in the application data directory for all users (default: `C:\Documents and Settings\All Users\Application Data\XPhone40\Templates`) so that they also have write permissions.

Note: The application data directory is not visible in the default Windows Explorer setting.

- In `Tools -> Options -> Messaging`, the user configures the messaging template directory to be the user's own application data directory (default: `C:\Documents and Settings\<User>\Application Data\XPHONE40\Templates`) and copies the template files (*.dot and *.txt) to that location.

16.2 Activating messaging features

- a) Go to `Tools -> Options` and select the `Messaging` tab.
- b) Switch the messaging wizard features on or off by activating / disabling the check box.

16.3 Creating custom messaging templates

- a) Go to `Tools -> Options -> Messaging`. Select a template type, e.g. `Letter`.
- b) Click `Add` and choose whether you wish to open an empty template or edit an existing template. Select the option `Existing template` if you wish to connect a template that is saved locally or centrally.
- c) Specify the directory in which you wish to create the template.
- d) Specify the file name and template name, or select the template you wish to edit. A Word document opens and the dialog window with the XPhone UC Commander fields appears. Now adapt the document to your specifications and enter your texts.
- e) Position the required fields.
- f) If you wish to copy an existing document manually to a template directory in XPhone UC Commander, you must specify the document name in Microsoft Word in the `Title` field (under `File -> Properties -> Summary`) as you wish it to appear in XPhone UC Commander. The `Category` field must contain `XPhone;Letter` for letter templates and `XPhone;Fax` for fax templates. The Word document must be saved as a .dot file.

16.4 Transferring your contact data to messaging templates

As well as the contact information, you can also have your sender data entered in your templates automatically. To do this, you must fill in your personal business card once:

- a) Go to **Tools -> Options** and select **Messaging**.
- b) Click on **My contact details** and enter your contact details.
- c) Add the corresponding field functions to the template if you wish the sender information to be transferred to your template. The prefix **XPABS** indicates the fields for the sender information.
- d) Select the template (see Modifying existing messaging templates) and click **Edit**.
- e) Now enter the fields in the template. Your contact data is now entered automatically.

Hint: It is advisable to have your own contact details entered automatically if central templates are used by multiple users.

16.5 Installing sample templates

First, check whether the messaging samples have already been installed on your computer:

- a) Go to **Tools -> Options** and select **Messaging**.
- b) Click the **Letter** button to modify an existing letter template.
- c) If no templates are displayed, it means that they have not been installed. You can install these templates very easily:
- d) Click the Windows **Start** button on the bottom left of the screen and open the **Control Panel**.
- e) Double-click the **Add or Remove Programs** folder and select **XPhone UC Commander**.
- f) Click the **Change** button. The installation wizard appears.
- g) Click the **Next** button.
- h) Activate **Change program** and then click **Next**. The **XPhone UC Commander** software components are displayed in a structure tree.
- i) Open the **Messaging examples** drop down menu.
- j) Select the option **This feature, and all subfeatures, will be installed on the local hard drive**.
- k) Click **Install** and then **Finish**.
- l) Exit the **Control Panel**. The messaging templates have now been installed.

16.6 Modifying existing messaging templates

- a) Go to **Tools -> Options** and select the **Messaging** tab.
- b) Click the **Letter** button to modify an existing letter template.
- c) Select the template and click **Edit**.
- d) The template opens. Edit the template and save the changes.

Hint: If you create a new template in the workgroup directory or modify a template stored there, these settings affect everyone who uses the same workgroup directory.

16.7 Removing messaging templates

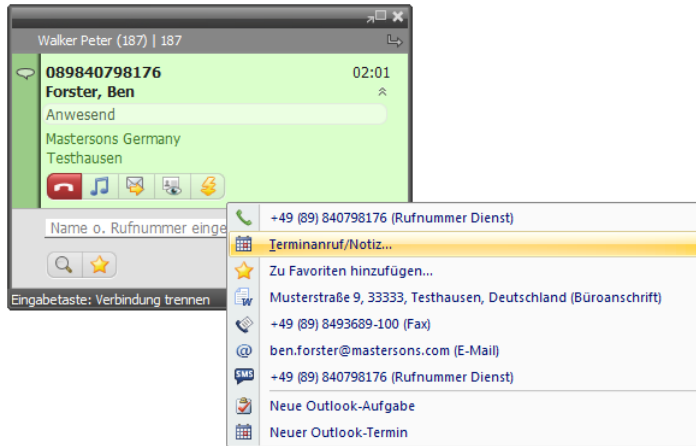
- a) Go to **Tools -> Options** and select **Messaging**.
- b) Click the **Letter** button to delete an existing letter template.
- c) Select the template and click **Delete**.

- d) Specify whether you want to remove the template from the directory or delete it completely.

16.8 Accessing messaging features

You can call the messaging features

- from a call (caller popup) by using <<Actions>>
- from an entry in the journal or the address book.



16.9 Notification of a missed call

- You can have an e-mail sent to you (or a colleague) to inform you of calls received in your absence. You can only use this feature if the CTI software was started on your computer and is running in the background.
- Open **Tools -> Options**.
- Select the **Messaging** tab and click **Missed calls**. The **Out of office message** window opens.
- Activate the **Send e-mail** check box. If you are using the Outlook or Notes add-on, you can also select the option of placing it in your own inbox.
- Enter your e-mail address and/or one or more other e-mail addresses in the **Recipient** entry field.
- Specify whether you wish to be notified of internal calls.
- Select a template from the **Template used** drop down menu.

16.10 E-mail call alerts

You want to inform a colleague of a conversation you had with a customer. To do this, you can send an e-mail call alert containing all relevant information on the contact, e.g. name, company, phone number, and the date and time of the call. You can access this feature

- via the context menu in journal entries
- directly from the caller popup during the conversation

Hint: If a call was forwarded or picked up by a colleague, the e-mail address of the dialled party is automatically added to the address field in the e-mail call alert.

17 Integration in Microsoft Outlook

17.1 Operating CTI functions from Microsoft Outlook (from Outlook 2010)

XPhone UC Commander functions can be integrated in the Outlook interface. You can control all telephone functions directly from this familiar interface without leaving the Microsoft Outlook window. You can access all data bases connected to XPhone UC Commander.

Starting telephony/messaging functions from the inbox

The XPhone ribbon offers the following messaging functions in Outlook as a whole:



Call

New fax (see Writing a new fax)

New text message (see Writing a new text message)

Open UC settings (see XPhone UM settings see "XPhone UC Settings")

Presence settings

Select an e-mail in your inbox (or any other element such as contact, task or appointment). The names of the persons involved (e.g. e-mail sender or other recipients) are listed by clicking the <<Call>> button and, if contact data is found, the available telephone numbers are shown in the additional menu. Click a number to open the respective contact.

Click **New fax** to open the fax dialogue for creating a new fax. Via the **To...** button, contacts can be selected and file attachments inserted via Drag & Drop.

Click **New text message** to open the text message dialogue for creating a new text message. Via the **Text message to...** button, contacts can be selected or entered manually.

UC settings can be easily opened by clicking the button.

Functions for calendar synchronisation are offered.

A detailed description of all Office functions can be found in the manual under Start -> All programmes -> XPhone UC -> Manuals -> Outlook User Manual

17.2 Starting search functions from the Outlook interface from Outlook 2010)

The XPhone ribbon integrated in Microsoft Outlook offers the **Find contact** function via the **Call** button. An entry window opens in which all address books linked with XPhone UC Commander can be browsed.

- Enter a name or part of a name in the entry field and press the Enter key.
- XPhone UC Commander opens and shows all of the search results.

Tip: You can use the entry field to browse all linked address books, regardless of their data base format.



17.3 Accessing Microsoft Outlook elements from XPhone UC Commander

Creating an e-mail call alert

You can create an e-mail call alert to inform a colleague about a call. (see also E-mail call alert see "E-mail call alerts"). You can access this function from

- a call (caller popup)
- a journal entry

Hint: If you picked up a call for a colleague, or if the call was forwarded to you, the e-mail address of the dialled party is automatically added to the address field in the e-mail call alert.

Opening Microsoft Outlook contacts

You can access the Microsoft Outlook contact data record corresponding to the caller from

- a call (caller popup or compact view)
- an entry in the journal or the address book.

Creating appointments and tasks

You can use the action dialog to access other Microsoft Outlook elements from a call or from an entry in a journal or address book. You can, for example, open your calendar and enter an appointment during a call. You can also create tasks in the action dialog.

- a) Go to **Tools -> Options** and select the **Outlook Add-On** tab.
- b) Go to **Actions** and select the check box **Display in actionmenu: Appointment, journal entry, task**.

Hint: If you picked up a call for a colleague, or if the call was forwarded to you, the name of the dialled party is automatically added to the address field.

Accessing another user's calendar

If a call was forwarded or you picked it up for another colleague, you can also open the calendar of the dialled party. This only works if you have an Exchange server. Access by others must also be enabled in that calendar. If you have write permission, you can make an appointment for that colleague.

Opening a journal entry

If you keep a journal in Microsoft Outlook, you can open the corresponding journal entry from a call. For more information, read Journaling in Microsoft Outlook.

17.4 Journaling in Microsoft Outlook

- a) Go to the fullscreen view (see Operation).
- b) Go to **Tools > Options** and select **Outlook Add-On**.
- c) Select the check box **Activate journaling for calls made**.
- d) Now specify the calls you wish to log in the Microsoft Outlook journal (you can also choose other database formats). You can change this selection at any time by clicking **Change**. You can specify a separate journal folder for each connected database. This makes sense if, for example, you wish callers saved in your personal address book to be entered in your personal Microsoft Outlook journal, but do not want callers from a company address book to be logged there, or wish them to be logged in a central Microsoft Outlook journal on the Exchange server.

Microsoft Outlook contact folders offer the additional option of displaying all calls to and from a certain contact in the **Activities** tab. To do this, you must assign the Outlook journal to the corresponding Outlook contact folder in Microsoft Outlook.

- a) Go to Microsoft Outlook and select the required Microsoft Outlook contact folder in the Microsoft Outlook folder list.
- b) Right-click to open the context menu.
- c) Select **Properties** and then **Activities**. Specify the folder group, so the folders that are connected to each other. The default journal folder is the Microsoft Outlook journal. If you wish to keep your journal in a different folder, e.g. a subfolder, you must create a new folder group. Click **New**.
- d) Enter a name for the folder group and then select the journal folder that you earlier selected for logging in XPhone Unified Communications, and then confirm your selection.

17.5 Starting the XPhone client and Microsoft Outlook simultaneously

If the Microsoft Outlook add-on is installed, the XPhone client always accesses Outlook functions, even if you have not yet started Microsoft Outlook. For this reason it is advisable to start Microsoft Outlook before starting the XPhone client.

If you have configured the XPhone client and Microsoft Outlook to start automatically when Windows starts, e.g. by adding the programs to the Startup folder, this may result in conflicts because of the different starting times of these programs. You can avoid these conflicts by going to **Tools -> Options -> Outlook Add-On** and activating the options **Start XPhone client with Outlook** and **Exit XPhone client with Outlook**. This way, the XPhone client and Microsoft Outlook are always started in the correct order.